A PHENOMENOLOGICAL STUDY OF THE TEACHER LEADER EXPERIENCE

by

Leslie Yancey Magnanti

Liberty University

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

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APPROVED BY:

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Abstract

The purpose of this transcendental phenomenological study was to understand the lived experiences of teachers in leadership roles in a rural, secondary school setting. The theory guiding this study was the theory of distributed leadership created by Spillane and developed by Groff, as it explained the power of teacher leadership as a method of distributing leadership to promote teacher retention and motivation alleviating some principal stress and burnout. Data was collected using interviews of the ten participants to better understand how teachers experience leadership and how administrators can promote it, focus groups to understand the phenomenon in more depth, and journals to understand the role of the teacher leaders clearly. Data was analyzed based on the procedures outlined by Moustakas for transcendental phenomenological research including transcription of interviews, collection of statements of the phenomenon, reduction and elimination of invariants and duplicates, documenting emergence of themes, and compilation of a textural-structural description of the phenomenon. Data collected through semi-structured interviews, focus groups, and journaling revealed the following three themes: teacher leadership requires active participation, there are requisite characteristics of teacher leaders, and teacher leadership has costs and benefits. The essence of teacher leadership can be summarized this way: an impassioned, accountable service for the purpose of school improvement. Theoretical and empirical implications, limitations and delimitations, and recommendations for future research are all discussed.

*Keywords*: teacher leadership, distributed leadership

**Copyright Page**

## Dedication

I dedicate this dissertation to my heavenly Father, Lord, Savior, and friend from whom all blessings flow. May it bring him glory.

**Acknowledgments**

There is not enough space on this page to thank my family for being so supportive of my educational aspirations.  I know it's an expensive and time-consuming passion, and you, my sweet husband and children, are patient to put up with me.

I would also like to thank my dissertation chair, Dr. Gregory Mihalik, for his support and patience (which seems to be a theme with me).  I appreciate every single piece of feedback and encouragement you have provided.

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**List of Abbreviations**

Every Student Succeeds Act (ESSA

Institutional Review Board (IRB)

No Child Left Behind (NCLB)

Professional Learning Community (PLC)

Teacher Leaders (TL)

## CHAPTER ONE: INTRODUCTION

## Overview

Teacher leadership, perhaps above all other educational reforms, holds the potential power to improve student achievement, increase teacher job satisfaction, and alleviate school administrator burnout (Berry, 2019). These are lofty goals for any educational reform (Berry, 2019). If educational reform is to truly take place, though, it will need to be mutually beneficial parties involved (Wenner & Campbell, 2017). Teacher leadership has the potential to affect positive change in schools as well as benefit teachers and administrators (Berry, 2019).

Although a unanimously agreed upon definition of teacher leadership simply does not exist in the research literature, teacher leadership can generally be defined. It will be understood in this study as the responsibility taken on by teachers inside and outside of the classroom to improve the school and student experience (Wenner & Campbell, 2017). Chapter one discusses the background of teacher leadership, including historical, social, and theoretical contexts. I discuss my relationship with the situation and explain the study's problem, purpose, and significance. Research questions are presented along with definitions of commonly used terms in the study, and a summary of the chapter is provided.

## Background

Education is in constant flux (Nguyen et al., 2019). A primary focus of modern education is increasing student mastery of standards and skills proficiency (Margolis & Strom, 2020). Teacher leaders are a powerful tool that can be harnessed to improve education from the inside out by improving teacher collaboration, promoting best practices, leading and supporting professional learning for teachers, and offering assistance on content-specific issues such as differentiation and rigor (Wenner & Campbell, 2017).

**Historical Context**

It is unsurprising then that modern education looks far different than education did thirty years ago (Little, 2003). Beginning in the 1980s, "teacher leadership formed the centerpiece of career ladder initiatives designed to reward accomplished teachers while also securing their commitment to teaching and marshaling their expertise in support of new teachers and school improvement" (Little, 2003, p. 401). In the 1990s, the age of accountability began in education (Little, 2003). No Child Left Behind (NCLB), bipartisan legislation signed by President George W. Bush, increased the federal role in education to ensure that the United States was competitive on the global education front (Klein, 2015). Race to the Top was introduced in 2009 by Barack Obama to promote school improvement at the local and state level (Chen, 2019).

Both laws were top-down education reform measures that legislators implemented to ensure every student was proficient and had mastered certain standards (Mitani, 2019; No Child Left Behind [NCLB], 2002). High-stakes testing and accountability measures were implemented to continue to improve the educational experience for all students in both congressional bills (Mitani, 2019). The pressure has continued to increase for teachers and school administrators from that time forward (Mitani, 2019). As these reforms have fallen out of favor politically and in education circles, teacher leadership has emerged as one of the more popular methods of reforming education in the United States (Berry, 2019).

There has been a great deal of research in the last decade that seeks to provide evidence of the positive empirical data resulting in teacher efficacy and student achievement resulting from the implementation of teacher leadership (Berry, 2019, Ingersoll et al., 2017, Shen et al., 2020). While 35 states in the US have formal teacher leadership policies, quite a few states; including Iowa, Tennessee, and North Carolina; have even begun to codify teacher leadership in

their evaluation standards, professional development opportunities, and positions available (Berry, 2019; Will, 2019).

### *The History of Teacher Leadership*

The role of the teacher has changed dramatically since the year 2000; previously, teachers were solely responsible for delivering content to their students (York-Barr & Duke, 2004). Their obligations were confined to the curriculum they taught within their own classroom. As the understanding of organizational development has shifted, teachers have become a primary vehicle for school reform (Cosenza, 2015; York-Barr & Duke, 2004).

Around the same time that a focus on teacher leadership began to emerge, the role of the school administrator began to shift (Coburn et al., 2016). In 1983, *A Nation at Risk* was published and stirred new waves of school reform (Coburn et al., 2016). The federal government has attempted to address the deficits highlighted in *A Nation at Risk* through such programs as No Child Left Behind (NCLB) and Every Student Succeeds Act (ESSA, 2015; Coburn et al., 2016).

These programs have had the effect of applying an inordinate amount of pressure on school administrators, which inevitably increases the stress the principal feels (Sorenson, 2006; Wells & Klocko, 2015). School administrators must be able to mediate with parents, oversee and manage teachers, improve student achievement, stay on top of the maintenance of a building, and manage the finances of an unwieldy, multi-faceted, and highly bureaucratic organization (Beausaert et al., 2016). With all of these pressures, principals face a great deal of stress and anxiety that can, if left unattended, lead to burnout and high levels of attrition within the profession (Sorenson, 2006). One of the ways that principals can help to alleviate some of these stresses and pressures is to use a distributed leadership framework to help shoulder the heavy

burden of school leadership. Teacher leaders hold the potential to be able to not only alleviate some of these stresses and pressures for principals but also to improve student achievement through the mobilization of one of the most potent resources within schools: teachers.

Initial forms of teacher leadership tools the form of managerial roles to improve efficiency within the school (York-Barr, & Duke, 2004). These were formal roles such as department chair, master teacher, or union representative (Wilson, 2016). This is the first of the waves of teacher leadership as conceived by Silva et al. (2000); the other two waves were defined as instructional expertise, collaboration, and continuous learning resulting from re-culturing within the school. At the same time, the assignation of formal roles was the first and still is the most practiced form of teacher leadership (Wilson, 2016).

These formal roles of teacher leadership were meant to increase efficiency but not to necessarily change or improve instruction (Wasley, 1991).  For example, the purpose of the department chair was to act as a go-between between teachers and school administrators.  When the administrators wanted something new enacted, they would teach and train the department chairs, who would, in turn pass on the knowledge to the rest of their department's teachers.

As a result of the limitations of these formal roles just discussed, the second wave of teacher leadership emerged: teachers as instructional leaders (Silva et al., 2000). These teacher leaders took on team leadership, curriculum development, and even helped their colleagues' professional development (Silva et al., 2000). This second wave of teacher leadership was considered an additional duty rather than part of teachers' everyday work (Silva et al., 2000).

In the third wave of teacher leadership, schools began to be re-cultured through the work of teacher leadership (Silva et al., 2000). While the other two waves have obviously not been entirely left behind as they are both still standard practices in schools today, this third wave of

teacher leadership focuses on school improvement as a result of the work of teacher leaders (Darling-Hammond, 1998). Wasley (1991) described these teacher leaders as those who could improve their colleagues' professional practice through school redesign and school improvement, mentoring, problem-solving school-level issues, and providing professional development opportunities for colleagues. This is obviously a much more transformative and far-reaching endeavor than the passing out of information required of teacher leaders in the first wave.

Currently, one of the most popular and promising, and widely enacted forms of teacher leadership in modern education is DuFour's concept of Professional Learning Communities (PLCs). DuFour (2004) believed "To create a professional learning community, focus on learning rather than teaching, work collaboratively, and hold yourself accountable for results" (p. 6). In PLCs, teacher leaders would ultimately call to the public what had thus far been considered private, such as the goals, strategies, pacing, concerns, questions, results, and materials used in instruction (DuFour, 2004). The focus on student learning and results were the impetus for continual improvement, and teachers began to personally take responsibility for students' learning (DuFour, 2004). Teacher leadership in PLCs does not look formally like a teacher leadership role. Still, teachers are required to step out of the silo of their own classroom instruction to lead in the effort to improve student achievement both inside and outside their own classrooms.

**Social Context**

As top-down accountability measures have grown out of favor, educators have sought other modes of reform (Berry, 2019). With more and more to do at the school level, school administrators have reached out to their best teachers to help take on some of the work of improving the student experience (Nguyen et al., 2019). This takes on many different forms in

different schools and areas.

Teachers are solicited or volunteer to be vital tools in the school improvement planning process and then are needed in implementing the plans (Wenner & Campbell, 2017). Teachers are called on to mentor beginning teachers (Wenner & Campbell, 2017). Professional development is often developed and even delivered by teachers who have mastery in certain competency areas (Wenner & Campbell, 2017). Mobilizing this teacher leadership force has the power to improve student achievement, motivate and retain teachers in the profession, and alleviate stress and burden for school administrators (Berry, 2019).

**Theoretical Context**

One of the gaps in the literature surrounding the issue of teacher leadership is a lack of a strong and universally accepted theoretical framework to be the foundation of future research (Wenner & Campbell, 2017). York-Barr (2004), widely considered to be the seminal research in teacher leadership, noted that distributed leadership was the most often used theoretical framework. Still, they also stated that researchers had used the frameworks of participative and parallel leadership around which to study teacher leadership.

Interestingly, Bronfenbrenner's ecological systems perspective has been applied to teacher leadership; the interwoven nature of the individual within the microcosm of the school setting makes this an apt conceptual context for researching teacher leadership (Bronfenbrenner, 1979; Smith et al., 2016). Wenner and Campbell (2017) confirm that distributed leadership is the most popular theory associated with teacher leadership. Still, they also found research centered on "democratic/constructivist leadership, structure and agency, parallel leadership, transactional leadership, and communities of practice" (p. 148). All of this is important because it highlights the need for further research and cohesion in the educational field around teacher leadership. The

research being done in this study will serve to understand the phenomenon itself better because currently there is not be enough information known about the topic to be able to begin coalescing around a particular theoretical framework.

## Problem Statement

The problem is that without teacher leadership, principals will inevitably be overwhelmed by the amount of work that is involved in running a school successfully, which will lead to principal burnout and attrition; additionally, without teacher leadership, teachers are not utilized as agents of change for good within their organization leading to a lack of motivation and increased attrition for the teachers themselves or their colleagues. Principals face an almost impossible job of managing human resources, ensuring instructional excellence, improving learning outcomes and accountability measures for students, often overseeing lean budgets, and a myriad of other duties and tasks (DeMatthews et al., 2021).

This stress and burnout help explain the 18% national average for turnover among principals, which negatively impacts teacher morale and student achievement (Bartanen et al., 2019). Teacher leaders can shoulder some of the burdens of school administration and are sometimes even more able to be agents of change because of their close proximity to students (Klein et al., 2018). Teacher leaders can have a significant impact on student learning and schools as well as their administrators. Many areas of education would be deficient in this impact without the work of teacher leaders. Teacher leaders often serve on school improvement teams and lead professional development (Berry, 2019). Teacher leaders greatly impact their colleagues through encouragement and modeling best practices (Cheung et al., 2018). Teacher leaders positively impact student achievement. Ingersoll et al. (2017) explained that schools who higher levels of teacher leadership also had higher mathematics and English test scores.

Teacher leaders themselves are also impacted by their work in their schools (Wenner & Campbell, 2017). When teacher leaders are given opportunities for their voices to be heard at the school level and are given a chance to make an impact both inside and outside their classroom walls, they are more likely to stay in the classroom longer (Grahn, 2018). Without teacher leadership and a better understanding of harnessing this powerful educational tool, there is a significant loss for all stakeholders in a school setting. Thus, it is invaluable and imperative that teacher leadership be better studied and understood.

Torres (2019) asserted that teacher-powered schools, schools that are intentionally structured to create and promote leadership opportunities for teachers as a means of school improvement, have the potential to increase teachers' job satisfaction, increase teacher autonomy, and maximize the resources available to promote student achievement. Teacher leadership is an amorphously defined term as varied as the schools in which it is implemented (Cheung et al., 2018; Wenner & Campbell, 2017). Wenner and Campbell (2017) suggest, "Perhaps it is this 'muddiness' that makes teacher leadership so intriguing to many educational stakeholders; teacher leaders can potentially fit into a variety of positions and meet the needs of any situation" (p. 135). The danger of this, they asserted, was that along with not being clearly defined yet widely implemented, there is a lack of rigorous research to support the phenomenon (Wenner & Campbell, 2017). Without teacher leadership, the burden on school administrators is shouldered alone. Teachers miss out on opportunities to be able to affect real change in their school inside and outside of their classroom, and teacher retention suffers because of this without opportunities for teacher leadership.

**Purpose Statement**

This transcendental phenomenological study aims to understand teacher leaders' lived experiences as they serve teacher leadership roles in a rural secondary school setting. In early stages of this research, teacher leadership was generally defined as the leadership work of teachers inside and outside the classroom to influence a school's instructional practices and efficacy (Jones, 2019).

**Significance of the Study**

Teacher leadership is neither clearly defined nor based on a universally accepted theoretical framework. This lack of cogency around the topic makes for an ambiguity that ultimately holds teacher leadership back from being the reform powerhouse it could potentially be.

**Theoretical Significance**

This study helps to further Gronn's (2002b) theory of distributed leadership because it provides educators with a clearer insight into how teacher leadership might be harnessed in schools to distribute leadership throughout the building rather than just in the principal's office. When school administrators understand the agency of teacher leaders to shoulder the heavy burden of educating today's students, they will be more able and willing to utilize teacher leaders as a valuable resource for distributing leadership and increasing agency throughout the school (Grahn, 2018).

**Practical Significance**

Practically, this study helps to examine what teacher leadership looks like in action in a rural, economically disadvantaged high school in North Carolina. The school has begun a steady improvement in student achievement over the last several years, and teacher leadership has the

potential to help continue this improvement. Improving the understanding of teacher leadership has the potential to dramatically change schools for the better and raise student achievement (Cheung et al., 2018). The knowledge gained from this study serves as an example of how teacher leadership works in other schools to benefit more and more students. As pressure mounts in this age of accountability, teacher leadership perhaps holds the key to mobilizing an untapped resource for the benefit of students (Margolis & Strom, 2020). This study attempts to fill a gap in the research literature around the locale of this study and the concise summation of teacher leadership.

**Empirical Significance**

Although the idea of teacher leadership has emerged in literature over the twenty years, it is still a relatively unexplored field (Wieczorek & Lear, 2018). There is a gap in explaining and identifying how teacher leaders lead instructionally and perform within a distributed leadership framework (Wieczorek & Lear, 2018). Torres (2019) suggested that qualitative research was needed to understand how teachers navigate through the negotiation of enacting teacher leadership in a distributed leadership model. Berry (2019) highlighted the need for research to adequately help the educational community to value the teacher leaders and their contributions.

Still, if there is no understanding of what teacher leadership looks like in practice in a variety of different settings, then teacher leadership cannot be adequately understood or valued. The problem is that until teacher leadership is consistently defined, it is difficult for administrators to harness the power and potential of teacher leaders in the classroom and education as a whole. In coordination with other research in teacher leadership, a clear description and definition of teacher leadership will help improve the practice and use for both teachers and administrators.

**Research Questions**

As a researcher, it is my goal to provide the educational research field with a clearer understanding of how rural secondary education teacher leaders feel, what they do, and what they experience as they participate in the role of being a teacher leader. The research questions are written and designed to be able to understand better the phenomenon of how teachers experience teacher leadership. My research questions flow from Gronn's three patterns of distributed leadership, which is the theoretical framework that underpins this study. Gronn (2002a) described distributed leadership as having three primary ways of collaborative engagement: spontaneous collaboration, intuitive working relations, and the institutionalization of formal structures. This study will seek to understand how teacher leadership is experienced through the lens of these three patterns.

**Central Research Question**

What are the lived experiences of teacher leaders as described by teachers and as they serve in teacher leadership roles in rural secondary school settings?

**Sub-Question One**

How do teachers describe teacher leadership experiences of spontaneous collaboration?

**Sub-Question Two**

How do teachers describe their teacher leadership experiences of intuitive working relations?

**Sub-Question Three**

How do teachers describe their teacher leadership experiences in institutionalized, formal structures?

**Definitions**

1. *Attrition* – Refers to teachers leaving the teaching profession (Kelchtermans, 2017).

2. *Communities of practice (CoP)* - *"*Communities of practice are formed by people who engage in the process of collective learning in a shared domain of human endeavor" (Wenger, 2011, p. 1).

3. *Distributed leadership* - "The aggregated leadership of an organization, is dispersed among some, many, or maybe all of the members" (Gronn, 2002b. p. 429).

4. *Democratic/constructivist leadership* - "Behavior that influences people in a manner consistent with/and or conducive to basic democratic principles and processes, such as self-determination, inclusiveness, equal participation, and deliberation" (Gastil, 1994, p. 956).

5. *Teacher leadership* - The leadership of teachers "who maintain a K-12 classroom-based teaching responsibility, while also taking on leadership responsibilities outside of the classroom" (Wenner & Campbell, 2017, p. 140).

6. *No Child Left Behind (NCLB)* - Legislation signed by George W. Bush to increase the federal oversight of school improvement to improve the US's competitiveness with other countries education systems (Klein, 2015).

7. *Parallel leadership* - A relationship between teacher leaders and principals that is grounded in the values of mutual trust, shared directionality, and the allowance for the individual expression (Crowther, 2002).

8. *Race to the Top* - *"*Race to the Top was introduced by President Obama in 2009 as a competitive fund to promote school improvement on both a state and local level" (Chen, 2019, p. 1).

9. *Transactional leadership* - "Represents those exchanges in which the subordinates influence one another reciprocally so that each derives something of value" (Kuhnert & Lewis, 1987, p. 649).

## Summary

Teacher leadership has untold potential in improving the future educational landscape (Berry, 2019). The problem is that without teacher leadership, there would be a significant loss to students, school administration, and even the teacher leaders.  This study seeks to understand the lived experiences of teacher leaders in rural secondary school settings.  There is no doubt that teacher leadership opportunities improve the lives of teachers and their students. Still, this research seeks to understand better what this looks like in practice to contribute to the dialogue on how the method can be improved in the future (Wenner & Campbell, 2017).

# CHAPTER TWO: LITERATURE REVIEW

## Overview

In this study, teacher leadership is studied as a means of solving the problems of principal burnout and teacher attrition. To study teacher leadership in this manner, the theoretical framework of distributed leadership, first championed by Spillane (2001) and Gronn (2002a), is examined as a means for understanding how the administration that has previously rested squarely on the shoulders of a few administrators at the top of the organizational ladder can now be stretched and shared by teacher leaders. This distribution of leadership even carries the added benefits, in some cases, of helping to retain influential teachers and building capacity in teacher leaders that can benefit students and the school in ways never thought possible.

In this chapter, the theoretical framework is examined thoroughly, including how it is currently enacted in schools. Teacher leadership is then examined to include its history, development, definition, and categorization. The positive impact and inhibiting factors are considered along with necessary conditions for and perceptions of teacher leadership. Finally, teacher retention and attrition, as well as principal burnout, are discussed to understand the power and potential of teacher leadership in modern education.

Thus, educators need to understand teacher leadership, its benefits and costs, as well as how to facilitate teacher leadership for improvement. With a greater focus and effort on understanding teacher leadership, how it is best and most consistently defined, and how to increase teacher leadership to affect change for school improvement best, the benefit will be immeasurable for both teachers, their students, their administrators, and their schools. There is still a great deal of work to be done in the area of teacher leadership, though, and this work begins with a better understanding of the phenomenon itself, a clear and widely accepted

definition of the phenomenon, and a plan for how to best enable school administrators to be able to identify and develop teacher leadership among their staff. This study serves to accomplish the first two of these three goals.

## Theoretical Framework

Distributed leadership, the theoretical framework underlying this study, is defined as a sharing of the essential functions of leadership among several group members. The focus is on the collective leadership that benefits the organization as opposed to a single individual performing all necessary leadership activities (Gronn, 2002b). A more current definition demonstrates the lack of change across decades: distributed leadership is comprised of interactions between multiple leaders in specific organizational situations (Canterino et al., 2020).  The first reference to distributed leadership in professional literature came from the social psychology field early in the 1950s, resurfacing briefly in the early 1990s when it also favored the people in the educational field (Gronn, 2002a). Gibbs (1954) asserted that leadership "inevitably embodies many qualities of the followers," and, it is impossible to distinguish who influences whom (p. 271).

Until this point, focused or concentrated leadership was the primary form of leadership, where leaders do what they want to be done (Rost, 1993).  Spillane et al. (2001) drew on the concepts of distributed cognition and were the first to conduct a study on distributed leadership, which they studied in Chicago schools. They asserted from their research that leadership comprises the interactions between leaders and their physical and social surroundings (Spillane et al., 2001, p. 27). Gronn (2002b), who based his work on the previous research of Spillane et al. (2001), proposed for the educational world that students and teachers would better be served by a revised conception of leadership, which focused on distributing leadership.

It became clear that it was not necessary, even in the educational setting, for one person, the heroic leader, to be the sole performer of leadership functions, but rather several members of a group could share leadership and individual leadership tasks could be delegated out to individual group members within the organization (Yukl, 1999). While Gronn (2002b) viewed the leadership patterns in terms of roles and structures, Spillane described the actual practice of leadership from a distributed perspective (Bagwell, 2019). This distributed perspective leadership practice is the outcome of the interactions between informal and formal leaders, the use of tools that facilitate the exchanges, and the structures within the organization (Diamond & Spillane, 2016). The distribution of leadership not only spreads the burden of leadership but also more effectively utilizes the expertise and skill of the group's members allowing more people to improve the educational experience for all involved. The skillful distribution of leadership requires acumen in the development of leadership skills in employees after the initial identification of leadership capability, which requires a level of skill that not all leaders possess.

**Gronn's Three Patterns of Distributed Leadership**

Gronn (2002a) noted that there are three patterns of collaborative engagement when distributed leadership is viewed holistically. The first and least institutionalized is spontaneous collaboration, which occurs when people across organizational levels come together to "pool their expertise and regularize their conduct for the duration of the task, and then disband" (Gronn, 2002a, p. 657). Group members, both leaders and followers, might come together over an unanticipated crisis, an upcoming audit, or any other leadership task, and the work of leadership is stretched across situational and social contexts of the school (Spillane, 2000a). Nguyen and Ng (2020) describe this process in terms of jointly planning, implementing, and even promoting a particular educational initiative. Teacher leadership can manifest in a plethora

of different ways ranging from formal and prescribed to informal and traditional, and the most organic and natural of these ways is through the spontaneous collaboration that takes place between colleagues whom all have the best interest of students at heart and are willing to step outside of four walls of their own classroom to be an agent of change.

The second pattern of collaborative engagement in distributed leadership is the intuitive working relations that emerge over some time (Gronn, 2002a). These natural working relationships develop as members of an organization begin to depend on one another and are not necessarily confined to formal leadership roles such as department chairs or formal mentoring relationships (Gronn, 2002a). These partnerships serve to balance any skill deficiencies each might have and generally occur when there is an overlap in responsibilities (Gronn, 2002a). Collaborative working relationships are only productive and only thrive when there is trust between the group members (Gronn, 2002a). For example, two teachers who are friends outside of the school might come together to co-chair graduation when the previous graduation chair leaves the school. The strengths and weaknesses of each teacher would balance to create a relationship built on trust and serves the school well. A teacher struggling with a problematic class might reach out to another teacher to vent her frustrations, and the collaboration between the two teachers naturally and organically leads to innovative solutions and a focus on collaborative problem-solving rather than a simple frustration. There is a need for this relational trust to be examined and hopefully confirmed in each situation in which teachers collaborate to ensure that the collaboration is productive (Kolleck et al., 2021). These relationships of trust built on experience and time have the ability to positively affect instructional practice and student outcomes (Kolleck et al., 2021).

Finally, the most formal pattern of distributed leadership is the institutionalization of formal structures (Gronn, 2002a). These institutionalized structures are created by school administrators in the educational setting and may be mandated to harness and regularize the informal relationships described above in the two other patterns of distributed leadership (Gronn, 2002a). In this organizational structure there is generally not a hierarchical structure but rather a *primus inter pares* (first among equals; Gronn, 2002a). Often this first among equals is appointed, elected, or simply chosen from the group (Gronn, 2002a). This could be the chair of a department or the appointed organizer of a particular event. This kind of distributed leadership is often seen in how committees are run within a school organization, with a leader being chosen from among the group to serve as a go-between between school administration and the committee of faculty. An example of this pattern of distributed leadership is seen in the development and implementation of professional learning communities where there are a group of professional equals who come together with a specific purpose to increase student achievement (PLCs; Von Dohlen & Karvonen, 2018).

**Related Literature**

Teacher leadership is how distributed leadership is implemented in the educational setting and has many positive benefits for all stakeholders including the school itself, students, administrators, and even teachers.  Although teacher leadership is implemented informally in many schools (Berry, 2019), most school administrators do not intentionally or systematically implement teacher leadership structures to improve the teaching experience for teachers and the learning experience for students. To grasp the importance and necessity of this study, it is essential to understand several concepts: teacher leadership, its definition, history, impact,

inhibiting factors, supporting structures, and teachers' perceptions; principal burnout, as well as teacher attrition retention.

**Historical Changes Leading to a Need for School Reform**

The world of education has changed dramatically over the last 75 years (Urban et al., 2019). They were beginning with racial desegregation in American schools in 1954, though not until 1971 were schools required to integrate (Janek, 2019). From 1954 to 1983, females and disabled people were also given increased equitable access to education in the US (Janek, 2019). As a response to the poverty in the country, Lyndon Johnson enacted the Elementary and Secondary Education Act (ESEA) of 1965, which gave significant federal aid to public education (Urban et al., 2019). ESEA was reauthorized in 2001 and became the No Child Left Behind Act (NCLB) that most Americans are still familiar with (Vinovskis, 2019). In the wake of World War II, the emergence of the baby boomer generation came with a need for the expansion of education, and with the growth of education came the need for more teachers (Janek, 2019). It was during this time when textbook companies came into existence and popularity to create "teacher-proof" curricula that went so far as to include scripts to use to include likely student responses (Janek, 2019, p. 74). This led to a generation of alliterates, students who can read but choose not to because they have not been shown the value or connection of their learning with real life (Janek, 2019).

The expansion of education also required the addition of more school administrators. Additionally, the federal government felt that more regulation at the national level was needed, and President Jimmy Carter created the Department of Education to oversee education in the US (Urban et al., 2019). Consequently, much of the local control was now taken and given to the state and federal levels of government (Janek, 2019). With federal funds came federal oversight

for vocational education, the due process of students before being suspended or expelled, and religious freedom such as prayer in school (Janek, 2019). After 1983 and the publication of *A Nation at Risk*, which led to a widespread loss of faith in local schools in America among the public at large, charter schools and vouchers became more popular, and the face of education continued to change dramatically (Janek, 2019).

All these changes resulted in increased demands on teachers' time, skills, and commitment with only minimal pay increases (Janek, 2019). Tragically, education changed dramatically after the school shooting that took place at Columbine High School in Colorado (Janek, 2019). This led to increased attention being given to school security, still a worthy primary goal of educators today, and inevitably to zero-tolerance policies for violence, weapons, harassment, etc., which certainly contributed to the school-to-prison pipeline that disproportionately affects people of color (Urban et al., 2019).

NCLB was reauthorized in 2015 and renamed the Every Student Succeeds Act (ESSA), and it came with increased emphasis on higher curricular standards (Vinovskis, 2019). The result was the Common Core State Standards, in which states adopted federally proposed curriculum standards to receive increased federal funds (Janek, 2019). These terms likely sound familiar to educators today because they are still the main drivers in modern education.  The goals largely unattainable under NCLB were only expanded and made further ambitious and unrealistic under ESSA (Vinovskis, 2019).

Each historical event described above ultimately contributes to the current state of education in schools. A great deal of emphasis is placed on accountability for districts, school administrators, and teachers (Berry, 2019). The focus on accountability means that at every level, educators are called upon to provide the best possible education for their students. Standardized

testing is used to measure these accountability models, and the goal is ever-higher test scores representing ever-higher student achievement. These higher standards and increased accountability lead to intense pressure to provide better education for children, and teacher leaders are primary agents of school change when appropriately utilized (Darling-Hammond, 1998). Unfortunately, these increased demands and ensuing accountability measures have rarely been accompanied by increased funding or incentives for teachers and school staff.

## Instructional Leadership

Instructional leadership as a relevant topic of educational research dates back to the 1950s when the *NASSP Bulletin* called on principals to be the instructional leaders of schools instead of merely administrators or managers (Corey et al., 1951). The concept of principals as instructional leaders has again gained traction with the accountability movement (Leithwood & Sun, 2018). While a ubiquitous term in modern educational settings, instructional leadership was a novel concept 45 years ago (Hallinger et al., 2023). Principals cannot do the work of instructional leadership on their own, though, so they must utilize the human capital of teacher leaders to push initiatives toward success. Instructional leadership can take on a variety of modes, but the two discussed here are instructional coaching and mentoring.

### *Instructional Coaching*

Instructional coaching is another by-product of the NCLB act, and it was a means for public schools to begin trying to transform into "nimble, instructionally-focused organizations" (Woulfin, 2020, p. 4). The object of using instructional coaches was to build capacity in teachers to be able to expand and refine their teaching practice (Mangin & Dunsmore, 2015). While professional development is essential, the instructional coach can take the professional development knowledge gained and transform it into actual, practical change for the classroom.

Instructional coaching is so effective because it takes ongoing professional development, one criterion for institutional change, and embeds it into the practice of the teachers' daily work (Kane & Rosenquist, 2018). There is even more value in the institutionalization of instructional coaching.  When a process, such as instructional coaching, is institutionalized, participants respond automatically and can get right to work instead of getting bogged down in reinvention or contestation (Kane & Rosenquist, 2018). These processes become more efficient and help in scaling reforms for even more significant successes (Suchman, 1995).

Schools without formal instructional coaching positions can still benefit from instructional coaching.  Principals and instructional coaches share many of the same instructional leadership tasks (Woulfin, 2020). The use of principals, though, as instructional coaches requires a new set of skills that must be developed and honed. Systematic observations using instruction and ongoing feedback and support are firmly in the wheelhouse of school administrators, and this kind of leadership practice can undoubtedly be one of the activities of a teacher leader under the proper guidance and supervision (Woulfin, 2020).

Instructional coaching is generally cyclical.  An effective coaching cycle's three essential elements are planning, teaching, and reflecting (Suarez, 2018). In another model, the same process is described in similar terms: identify, learn, and improve (Knight et al., 2015). In the planning/determining step of the cycle, the first step is to get a clear picture of reality through video, observation, or conversation (Knight et al., 2015; Suarez, 2018). Once a goal and teaching strategy have been set and established in the planning phase, the next phase in the instructional coaching cycle is when the actual teaching occurs (Knight et al., 2015). This phase often includes the coach modeling the strategy, sometimes in the teacher's classroom, in a class with no students, through co-teaching, or through observation of another teacher's classroom (Knight et

al., 2015).  This is not just a time of learning for the teacher but a time of collaboration between the teacher and the coach (Suarez, 2018). The instructional coach is not evaluative or necessarily more powerful than the teacher but rather is an objective set of eyes and ideas who can offer suggestions and model best practices.

Finally, the cycle ends with a time of learning from or reflecting on the experience (Knight et al., 2015; Suarez, 2018). The two engage in conversations about how well the learning objectives have been met (Suarez, 2018). This phase also includes reviewing any resulting data that can confirm whether or not the learning objective has been met by all students (Knight et al., 2015). The data is used as a way to facilitate coaching conversations that help to identify what was successful instructionally and what still needs to be improved upon.

These instructional coaching cycles lead to multiple benefits for the teacher and the school (Warnock et al., 2022). Instructional coaching strengthens the relationships between teacher and coach, between teachers, within coaching groups, and with students (Warnock et al., 2022). These positively reinforced relationships were a result of developmental yet non-judgmental or evaluative feedback (Haneda et al., 2019). Another benefit of instructional coaching is the enhanced practice that inevitably resultant from the process; the teacher and coach are focused on efforts to improve the quality of education (Warnock et al., 2022).  This mindset on improvement extends the ethos of teacher training throughout the instructional coaching process and perhaps into the teaching career (Warnock et al., 2022). Awareness and reflectiveness also result in instructional coaching benefits (Loftis & Thomas, 2017; Taconis, 2018). The teacher leader who engages in the instructional coaching process can sow all these rewards for the school in addition to their own practice.

*Mentoring*

Mentoring is defined as the complex, collaborative process that takes place between people of varying levels of expertise and experience wherein the expert, the mentor in this case, supports his or her colleague, the mentee, toward becoming more efficient and toward achieving institutional goals (Petrovska et al., 2018). In North Carolina, state law requires that mentors be provided to beginning teachers who have less than three years of appropriate service as an induction program to the start of their new career in education, and the requirement for a mentor ends when the teacher has received their continuing license (North Carolina State Board of Education, 2020). Under this policy, mentors must support beginning teachers to demonstrate leadership, establish a respectful environment for a diverse population of students, know the content they teach, facilitate learning for their students, and reflect on their practice (NC State Board of Education, 2020). These goals of the mentor align with the standards for evaluation for all teachers in North Carolina.

Mentors can provide innumerable services to their mentees. Still, good mentors provide emotional support, take time to listen, exhibit patience, are open to new ideas, provide nonjudgmental feedback, possess the knowledge and expertise to guide their mentee, encourage risk-taking, and hold high expectations for their mentees (Parker et al., 2021). Mullin and Klimaitis (2021) concluded that a highly-effective mentor has the ability to enable a first year teacher perform as well as a third year teacher. Teachers who have positive impacts on their own students are most effective at helping beginning teachers to be more effective earlier on than their non-mentored counterparts (Mullin & Klimaitis, 2021).

One of the most common formal roles of teacher leadership is mentoring (Dozier, 2007). The mentor teacher displays teacher leadership by showing a desire to improve the school in its

entirety (Msila, 2012). The mentoring role also provides the mentor with benefits, including the space to develop the capacity to support other educational professionals toward reaching their potential (Gul et al., 2019). These teacher leaders need support and preparation for their mentoring role to succeed (Gul et al., 2019). Choosing the teachers who are most effective in their own classrooms and then properly training them to mentor new teachers effectively are both requirements for a successful teacher mentorship program.

### *Professional Learning Communities (PLCs)*

Professional learning communities (PLCs), as defined by DuFour (2004), is often used as a term to label every single collaborative effort of educators, but he more concisely defines it as group whose focus is more on learning than teaching with an emphasis on collaboration and accountability. While learning is the focus of a PLC according to DuFour, others note that learning as a means of increasing student achievement is the only learning that matters in a PLC (Brown et al., 2018). The power of PLCs is that the collaboration is specifically for the purpose of improving student learning and holding space for teachers to react when student learning does not take place as it is supposed to (Brown et al., 2018).

Traditionally, teaching has been a solo activity in which the door is closed, and there is quite a bit of privacy and independence (Olsson, 2019). PLCs allow for teachers to move their private practice out into public discourse (Olsson, 2019). The collaboration that takes place in these PLCs creates an environment in which teachers can improve their practice and, thus, improve student achievement (Prenger et al., 2019). PLCs take on collective learning and reflecting on personal practice (Ning et al., 2015).  In sharing personal practice, teachers develop professionally by engaging in peer coaching, classroom observations, and discussions about classroom learning (Ning et al., 2015). In this way, the responsibility for student learning overall

is shared by everyone in the PLC rather than on the shoulders of only the assigned teacher (Brown et al., 2018). In the same way that teacher leadership distorts the traditional leadership structure within schools, PLCS ensure that "hierarchies are flattened…. giving everyone the chance for leadership" (Brown et al., 2018, p. 56). PLCs are an effective way for all teachers to engage in improving student achievement for all students throughout the school and for collaboration between more and less effective teachers to possibly develop the skills of teacher leaders organically.

**Teacher Leadership**

There is no consensus about a standard definition of teacher leadership in the literature (Cosenza, 2015; Nguyen & Hunter, 2018). There is, though, consensus that teacher leadership cannot be defined with any level of consensus in the academic community (Neumerski, 2012; York-Barr & Duke, 2004). Cosenza (2018) suggested that teacher leadership is less about teachers' power and more about extending their presence outside of the classroom. It has been recommended that teacher leaders be included in decisions that will affect students, such as scheduling, curriculum, and organizational change (Cosenza, 2018). Weisse and Zentner (2014) noted that teacher leaders are adept at being able to develop a culture of collaboration, staying current in best practices and research, understanding how new paradigms can promote embedded staff development, being a continuous learner, working collaboratively with colleagues, and understanding the larger context of the student including their communities, cultures, and families. Klein (2018) contended that teacher leadership is better defined by the actions of the teacher leaders for a clear conceptualization. Sterrett (2014) defined teacher leadership in three key areas: school culture leadership, collaborative learning leadership, and school management leadership.

It is easier to discuss the work the teacher leader engages in than to succinctly define teacher leadership. Wenner and Campbell (2017) described teacher leadership as the work the teacher leader does outside the classroom. What makes teacher leadership most challenging to define is that many parents, students, principals, and even teachers do not even recognize or understand teacher leadership in its most basic form (Wenner & Campbell, 2017). Öqvist and Malmström (2017) defined teacher leadership as "a mobilization of the available attributes of teachers to influence students at the ground level during their daily activities at school, within and outside of the classroom, and beyond" (p. 5). What should be a fundamental term in the modern educator's vocabulary can barely be cohesively defined by even the academics who study it in academia. This is because teacher leadership can take on as many iterations as there are teacher leaders. Teacher leadership is best understood in terms of the teacher leader's work.

Even without a standard definition of teacher leadership, teacher leaders can affect significant change through many roles within the school organization. Teacher leaders can lead in coordination/management, district and school-level curriculum work, professional development, school change and improvement, parent and community involvement, and preservice teacher training (York-Barr & Duke, 2004). Wells and Klocko (2015) assert that teacher leaders are, most importantly, highly effective teachers in their own classrooms, giving them credibility and instructional strength to influence others. The power of the teacher leader stems from the trust their school administration and colleagues have in them based on their success first in the classroom (Wells & Klocko, 2015). Teacher leaders can lead in any number of aspects of school to improve student achievement. Von Dohlen and Karvonen (2018) found that teacher leaders most often reported engaging in informal leadership activities though they

would prefer to have more opportunities to lead in their district and school in formal leadership roles.

Teacher leaders often work collaboratively with colleagues to generate ideas and construct meaning (Von Dohlen & Karvonen, 2018). Teacher leaders work in professional learning communities (PLCs) to work toward shared goals in the school and serve on school improvement teams to be agents of change outside their classrooms (Von Dohlen & Karvonen, 2018). Teacher leaders can help informally by influencing their colleagues and being an example of forward and proactive thinking (Klein et al., 2018). Teacher leaders can lead in a myriad of ways with the proper support from school administrators and can potentially affect great change for the school and, most importantly, the students (Klein et al., 2018). The real issue for school leadership is how to properly utilize and harness this powerful educational tool in a way that maximizes effectiveness and efficacy.

Teacher leadership is such a powerful educational tool that many states have even begun requiring teachers to demonstrate teacher leadership inside and outside the classroom as a part of their evaluation system (Von Dohlen & Karvonen, 2018). North Carolina, for example, began in 2015 requiring not only that teachers demonstrate teacher leadership and be evaluated on it in their teacher evaluation system but also that principals use distributed leadership to encourage teacher leaders to step into available leadership roles and to best utilize the influential teachers at their disposal in the most effective way (North Carolina Department of Public Instruction [NCDPI], 2015). The first standard assessed in the teacher evaluation system in NC states that "Teachers demonstrate leadership… in their classrooms… in the school… in the teaching profession… for schools and students… and with high ethical standards" (NCDPI, 2015, p. 3).

This systemic movement toward distributed leadership as the standard instead of the exception has begun to change the face of education and open infinite possibilities for school improvement.

This movement of evaluating teachers based on their leadership activities within the school stems from the power and influence of a teacher leader to affect change. Teacher leaders can affect change through many aspects of the school organization. They can lead in areas of coordination/management, district and school-level curriculum work, professional development, school change, and improvement, parent and community involvement, as well as preservice teacher training (York-Barr & Duke, 2004). Wells and Klocko (2015) assert that "Teacher leaders are, first and foremost, effective classroom teachers and therefore able to influence others by their credibility and instructional strength" (p. 316). The power of the teacher leader stems from the trust their school administration and colleagues have in them based on their success first seen in the classroom (Wells & Klocko, 2018). Teacher leaders can lead in any number of aspects of school, both inside and outside of the classroom, for the purpose of improving student achievement. Teacher leaders are better sources of instructional influence than even school administrators because teachers often have more first-hand experience, expertise, and personal experience using resources (Supovitz, 2018). They are also more accessible than school administrators when teachers have needs that arise. Teachers providing leadership to their peers occurs daily in almost all school settings, but this tool is rarely used as effectively by school administration.

### *The Development of Teacher Leaders*

Prospective teacher leaders must possess an initial capacity in four essential areas. They must have a general potential for the work of leadership, receptiveness, and readiness to learn, psychological and cognitive capabilities, and socio-relational skills (Smylie & Eckert, 2018).

Teacher leaders must be able to improve and grow professionally to embrace the spirit of change and improvement inherent in teacher leadership. Not surprisingly, it is vitally important that the teachers see themselves as possessing leadership capabilities (Smylie & Eckert, 2018). It is necessary, too, that the development of teacher leadership includes meaningfulness, task variety, and feedback to create influential teacher leaders (Smylie & Eckert, 2018). All of these requisite initial capacities involve a focus on an ability to improve and grow professionally and personally; teacher leaders must be the primary learners in their schools to facilitate the improvement of learning for students (Bond & Hargreaves, 2015).

Teacher leaders do not simply effortlessly materialize, able and ready to help and to be agents of change in schools. Additionally, teacher leadership is not merely a way to divide managerial labor or pass principals' duties to others (Little, 2003). Principals can appoint and anoint teachers to positions and responsibilities of leadership outside of the classroom. Still, if those teachers are not professionally equipped to complete those tasks, it is wasted effort and time (Smylie & Eckert, 2018). Instead, the principal must primarily carefully identify and develop new teacher leaders.

Advocating for teacher leadership is not the same as developing teacher leadership (Smylie & Eckert, 2018). This development must be an "intentional, systemic, systematic development of teachers' capacity for leadership and teachers' leadership practices" (Smylie & Eckert, 2018, p. 557). Teacher leadership development begins with a culture that emphasizes distributed leadership and values the contribution of teachers (Wells & Klocko, 2015). It is, first and foremost, an organizational climate issue. Sterrett (2014) asserted that the conditions that make teacher leadership most effective could be categorized into three domains: school culture

and context, the level of trust between faculty, including administration, and the structures in place for decision-making, professional development, and the use of time and space.

To develop teacher leadership, Wells and Klocko (2015) insisted that teachers move through three phases of teacher leadership, which emphasizes the depth and breadth rather than a path all teacher leaders must follow, begins with the department head, moves to the curriculum leader and mentor, and finally ends with instructional improvement and school improvement leader. Leadership development must be systemic in that it must include not only the teachers but also principals, other administrators, and other teachers (Smylie & Eckert, 2018). This places the primary responsibility for teacher leadership development on the school and the district instead of solely on the shoulders of the principal alone (Smylie & Eckert, 2018).

What is evident in all of these lines of thought about the development of teacher leaders is that it is accomplished only with forethought and intention. Focused teacher leadership training can move teacher leaders from "consumers of change to producers of change" (Von Dohlen & Karvonen, 2018, p. 81). The effective school administrator sees teacher leadership not as a threat to his or her own power but as a powerful tool that can be wielded to benefit students and improve achievement.

An important area of required development for teacher leaders is in their capacity for change (Amels et al., 2021). The capacity for change can be developed over time, and it is defined as the ability "to maneuver in relation to initiated innovations" (Amels et al., 2019, p. 734). This capacity for change is developed and strengthened when the school administration and the school as a whole are engaged in continuous professional learning and professional development for the purpose of improving students' academic achievement (Harris et al., 2015). Teachers develop capacity and especially the capacity for change through collaboration to reach

goals and find solutions, and this type of collaboration through joint work requires a higher level of the interdependency of tasks (Amels et al., 2021). Teachers can also develop their capacity for change through professional learning, which is helpful to encourage experimentation, reflection, and the ability to share experience and knowledge as a team (Camburn & Han, 2017). The power of the teacher leader to internalize school goals, personal efficacy, and job satisfaction is another critical element of crucial importance to the development of capacity in teacher leaders (Thoonen et al., 2011).

Critical consciousness is the teacher leaders' ability to understand the "historical, political, economic, and legal structures that influence our world…" to "relate these structures to the ways that people can live out their lives" (Zamudio et al., 2009, p. 456). As teachers develop critical consciousness, their personal responsibility attitude is modified, and it becomes more apparent to the teacher how their personal choices affect the social reality of the school (Carlson et al., 2006). Bradley-Levine (2012) explain that this growth of critical consciousness is helped immensely by the guidance of a leader, counselor, or other teachers. This process is personal and communal and cannot occur in isolation (Bradley-Levine, 2012).

Teachers' capacity for intrapersonal and interpersonal abilities must also be developed for effective implementation of teacher leadership (Smylie & Eckert, 2018). Teachers must be able to problem-solve, possess self-awareness and self-regulation, and have the emotional maturity to participate in teacher leadership opportunities (Smylie & Eckert, 2018). Avidov-Ungar et al. (2021) note that effective communities of practice (often labeled PLCs in educational jargon) are characterized by good interpersonal communication and warm interpersonal connections. These intrapersonal skills must also possess communication skills,

credibility, trustworthiness, positive and productive working relationships with colleagues, and the ability to manage the collaboration process (Smylie & Eckert, 2018).

Obviously, challenges must be faced in principals' development of teacher leaders. Administrators must be able to find ways to overcome challenges in communicating their strategic intent to teacher leaders (Cheng & Szeto, 2016). The principal must also encourage teachers to see themselves as valuable agents of change for the school's values and direction (Cheng & Szeto, 2016). Administrators must also be able to hold space for individuals to innovate and know when to step back and support teachers in their leadership development (Cheng & Szeto, 2016). When difficulties arise in the school setting, the principal must be able to use those difficulties to create opportunities for teacher leaders to lead (Cheng & Szeto, 2016). As successes accumulate, good administrators leverage these achievements to create a culture of success (Cheng & Szeto, 2016). Leadership is a skill developed and honed; teacher leadership is no different.

### *Defining and Categorizing Teacher Leadership*

Teacher leadership is an umbrella term under which all manner of teachers' activities might fall.  Berg and Zoellick (2018) acknowledge that defining the term is difficult and inconsistent among researchers, but they explain that all teacher leadership implicitly includes four dimensions: legitimacy, support, objective, and method.  Legitimacy in this context can be defined as the basis for which the teacher's claims are to be trusted (Berg & Zoellick, 2018). The dimension of support is the way in which school leaders support teachers' leadership, such as through time, culture, and encouragement (Berg & Zoellick, 2018). Objective and method are the final dimensions, and they are the targets of change and improvement and the ways in which that influence is enacted (Berg & Zoellick, 2018).

While defining teacher leadership in a consistent manner is difficult for researchers (Berg & Zoellick, 2018; York-Barr & Duke, 2004), there are many ways to classify the work that teacher leaders engage in within their school environments. One of the simplest and most helpful ways to categorize teacher leadership is in terms of formal and informal leadership roles. Formal teacher leaders are those who generally apply for or are selected to be in a particular leadership role, such as department chair, instructional coach, assigned mentor, or staff development coordinator at the school level (Oppi et al., 2020). On the other hand, informal teacher leaders generally take a more self-initiated approach to improving their school through engaging colleagues in conversations about instructional strategies, actively participating in PLCs, sharing instructional materials, and engaging in informal mentoring (Oppi et al., 2020).

Another way of categorizing teacher leadership is through role-based initiatives, which are individually based, and task-oriented approaches, which are more collectively based, according to Smylie et al. (2002). These two approaches were combined and streamlined by Snoek et al. (2019) to outline four forms of teacher leadership: role-based teacher leadership, which is the formal-individual form; collective role-based teacher leadership, which is the formal-collective form; initiators, which is the informal-individual form; and community-based teacher leadership, which is the informal-collective form. While the glory and attention are often showered on formal, individual forms of teacher leadership, Snoek et al. (2019) advise that schools should aim mainly for the informal-collective form of teacher leadership to pull nearly every teacher into an active role in school improvement.

Muijs and Harris (2007) expanded the notion of teacher leadership by summarizing four major teacher leadership dimensions: (1) brokering roles that secure opportunities for teacher development, (2) participative roles that foster collaboration in working toward collective goals,

(3) mediating roles to enable the school to best use external resources and expertise for the improvement of the school, (4) and finally roles that focus on forging close relationships between teachers in PLCs. More recently, Muijs et al. (2013) explained that the crossing of four main boundaries can categorize teacher leadership: (1) classroom boundaries, (2) subject boundaries, (3) team boundaries, and (4) organizational boundaries. Each of these categorizations helps to clarify that teacher leadership is a broad term that encompasses a plethora of leadership activities for teachers within the school.

### *The Positive Impact of Teacher Leadership*

High-quality teacher leadership has a far-reaching impact on many aspects of schooling, including on students, colleagues, and the collective school community (Weisse & Zentner, 2014; York-Barr & Duke, 2004). Teacher leaders themselves are most strongly affected by the implementation and practice of teacher leadership (Oppi et al., 2020). Participating in teacher leadership roles has been shown to improve self-esteem, work satisfaction, and motivation for teacher leaders (Oppi et al., 2020). The teacher leader understands how important it is to treat students as individuals (Weisse & Zentner, 2014). The teacher leader impacts students because of their open-mindedness, adaptability, and willingness to explore possible solutions to improve student outcomes (Weisse & Zentner, 2014; York-Barr & Duke, 2004). Students benefit significantly from having a teacher leader as their classroom teacher because of their resourcefulness and ability to find innovative solutions for problems (Weisse & Zentner, 2014). Ingersoll et al. (2017) found that schools with the highest levels of teacher-based instructional leadership had substantially higher mathematics and English test scores when compared with those schools where teacher leadership was at lower levels.

Teacher leaders also impact their colleagues within their school (Weisse & Zentner, 2014; York-Barr & Duke, 2004). Weisse and Zentner (2014) insisted that teacher leaders helped their colleagues most through their motivating, exemplary presence. Teacher leaders can be leaders within professional learning communities by providing their colleagues with encouragement and a model for helping teachers within their school to become better and more effective (Cheung et al., 2018). York-Barr and Duke (2004) noted that teacher leadership can be made more difficult because of the relationships between teacher leaders and their colleagues. Teacher leaders are sometimes reluctant to step up and take the lead when giving critical feedback to their colleagues with whom they have close relationships (Weisse & Zentner, 2014). Teacher leadership is an asset to the school community (Weisse & Zentner, 2014). Teacher leaders who lead through service on school improvement teams and by leading professional development can positively influence their school communities (Weisse & Zentner, 2014; York-Barr & Duke, 2004). Shared decision-making for the teacher leader provides a way for teacher leaders to impact the school and the larger community (Berry, 2019).

Weisse and Zentner (2014) posited that teacher leaders themselves are most impacted by teacher leadership. Teacher leaders are allowed to develop their leadership skills, professionally in both content and pedagogy, and develop collaborative skills (Weisse & Zentner, 2014). Weisse and Zentner also suggested that "teacher leadership is a potential solution to the drift and detachment experienced by many teachers during their careers" (p. 282). The impact of teacher leadership on the teacher leader is not always positive (Weisse & Zentner, 2014). Teacher leaders often experience added stress and burdensome workloads because of the additional duties that come with teacher leadership (Weisse & Zentner, 2014). Overall, teacher leaders report that they positively benefit from their leadership role (Weisse & Zentner, 2014; York-Barr & Duke,

2004). With 40% to 50% of teachers leaving within the first five years of their career, something must be done to retain quality educators, and teacher leadership might be a step in the right direction for some (Wenner & Campbell, 2017).

### *Inhibiting Factors and Requirements for Teacher Leadership*

Although the work of teacher leadership is rewarding and greatly impacts the school, colleagues, students, and the teacher, there is a certain amount of difficulty that naturally comes with the teacher leadership position. Many factors inhibit teacher leadership, including resistance to change, lack of a unified vision, hierarchical structures, and deficits in clear communication (Oppi et al., 2020). Additionally, teacher leaders have often been entrenched in the classroom themselves and have all the duties of being a classroom teacher (Nguyen & Hunter, 2018). In addition to these duties, though, which are daunting in and of themselves, the teacher leader also takes on the additional responsibilities that come with being a teacher leader, and there is rarely monetary compensation (Wenner & Campbell, 2017). The workload is overwhelming for many teachers without the added burden of teacher leadership, so some allowances should be made to accommodate these teachers' additional demands (Wenner & Campbell, 2017).

Another inhibition to teacher leadership is poor relationships with school administrators or colleagues (Wenner & Campbell, 2017). Suppose a principal is unsupportive or does not put into place the structures or supports necessary to facilitate teacher leadership. In that case, it simply will not thrive, and students cannot reap the benefits (Ni et al., 2018). School administrators are powerful agents of influence within the school, and they have the power to multiply their influence through the effective utilization of teacher leaders.

*Necessary Conditions for Teacher Leadership*

Teacher leadership does not happen very often without concerted effort. The principal is vital in developing teacher leadership as a mechanism for school change and improvement (Johnson et al., 2014). Little (2002) explained that principals must be willing to share power with teachers even when that could be uncomfortable. Thus, the principal's willingness to engage in the development of teacher leadership is a necessary condition. York-Barr & Duke (2004), seminal researchers in the field of teacher leadership, found that in the literature, there appeared to be three main conditional categories for teacher leadership: school culture and context, school structure that supports teacher leadership, and the recognition of the teacher leadership role and its interaction with the role of the principal and other collegial peers.

To promote a culture in which teacher leadership thrives, the school administration must provide teachers with ample opportunities and encouragement to step into teacher leadership roles (Oppi et al., 2020). The principal must be open and able to vision sharing during routine interactions with teachers (Szeto & Cheng, 2018). Principals must also be able to accept and validate the ideas and input of teachers, as this increases intrinsic motivation for teachers to actively seek opportunities in which they might lead change (Oppi et al., 2020). Obviously, principals must be visible and accessible to teachers to promote teacher leadership and teacher leadership opportunities (Hulpia et al., 2009). Unsurprisingly, teachers who engaged in teacher leadership became more and more committed to their school and more willing to step up and take on the leadership opportunities presented to them (Oppi et al., 2020). Trust is a key ingredient in these interactions between principals and teachers regarding teacher leadership. Principals must be able to trust in their teacher leaders to do what needs to be done, and teachers,

conversely, must trust that their administrator will support and empower them to be an agent of change within the school (Szeto & Cheng, 2018).

Another condition necessary for fostering teacher leadership is a culture of collaboration (Azorin et al., 2022). Educational leaders play the most crucial role in developing a collaborative culture in which democratization and openness can lead to educational change (Fullan & Quinn, 2020) as teachers from different backgrounds come together for professional learning communities and teacher collaboration, systematic change results (Schuster et al., 2021). Moving from the older model of teaching from behind a closed classroom door, collaborative school cultures have begun to surge since the COVID-19 pandemic resulting in student-centered learning and increased pedagogical innovations (Azorin, 2022).

### *Perceptions of Teacher Leadership*

Teacher leadership is not often a topic of professional conversation in schools. The aforementioned lack of a consistent definition makes this especially true. Lovett (2018) found that teachers often do not have the educational vocabulary to discuss teacher leadership when asked about their own experiences at their school with teacher leaders. The term teacher leaders had to be defined and understood before they could even begin discussing teachers' leadership work in their school building (Lovett, 2018).

Another thing that makes discussing teacher leadership difficult is that teacher leadership is often informal.  The teacher leaders' actions may not even be noticed by his or her colleagues or administrators (Meirink et al., 2019). Teachers often perceive stepping out into a teacher leadership role as a risk, and teachers' willingness to take on teacher leadership roles is, thus, often associated with the culture around risk-taking within the school (Lovett, 2018).  Teachers often resisted the label of a leader because of the connotation of superiority that is inherent in the

title, and the label teacher leader was often most associated with teachers who were aspiring to be school administrators (Lovett, 2018).

Meirick et al. (2018) described teachers' level of involvement in teacher leadership activities as a hierarchical order, with the lowest activity in teacher leadership being 'witness,' the next level being 'participation,' and the highest and most active level being 'ownership. These three hierarchical levels are helpful to the understanding that teacher leadership is not an all-or-nothing concept. There are levels of teacher leadership involvement, just as in most other educational constructs.

### *Hybrid Teacher Leadership (HTL)*

As teacher leadership has become more and more prevalent throughout the US in the early 2000s, the concept of hybrid teacher leadership (HTL) emerged (Margolis, 2012). This is due to the pressure school leaders felt from the NCLB legislation and the push to distribute the leadership among teachers (Bagley & Margolis, 2018). The terminology varies among organizations (sometimes called a border crosser or instructional coach). Still, a hybrid teacher leader teaches in the traditional sense and is compensated for leading teachers in some capacity (Bagley & Margolis, 2018). These positions can vary wildly, but a typical teacher-leader model could be 80%-20%, 50%-50%, or 20%-80% (Bagley & Margolis, 2018). Wenner and Campbell (2017) note that these positions are not without added stresses. There is a lack of time, adversarial school climates, and easy difficulties managing the dual peer roles that arise as a byproduct of these dual roles (Wenner & Campbell, 2017).

### Principal Burnout

Sorenson (2007) reported that the principal's job has been identified as one of the most stressful jobs. The principalship consists of countless duties, including financial oversight,

instructional leadership, faculty management, etc., which can, undoubtedly, lead to stress and burnout. Principals also face a great deal of political pressure from supervisors and the community (Wells & Klocko, 2018). Weick (1996) noted that the metaphorical language used by principals was indicative of the nature of the difficulties involved in the position: "taking the heat, putting out brush fires, getting burned by decisions, stopping rumors that spread like wildfire, looking for the fire where they spot to smoke, facing explosive situations, and watching the fireworks at board meetings" (p. 565). As accountability increases, so does the pressure on principals (Wells & Klocko, 2018). Principal burnout, then, is defined as the stress that occurs as a result of the occupation that can negatively impact both professional and personal well-being (Knight, 2021).

Based on the burden of the job as a school administrator, it is not surprising that stress often has negative effects. Wells (2013) explained that stress could lead to health, mental well-being, and occupational effectiveness issues. It is difficult for principals to effectively cast vision and maintain the energy necessary to ensure change and improvement while facing what can feel like insurmountable stress (Wells, 2013). Stress can lead to a variety of negative consequences personally, in addition to the professional loss of effectiveness and productivity, for principals, which can include high blood pressure, loss of appetite, propensity to overeat, ulcers, and many other health concerns (Sorenson, 2007). Sorenson (2007) added that stress could lead to psychological issues, including anxiety, depression, boredom, and professional burnout. Professionally, Sorenson noted that professional stress could lead to absenteeism, high turnover rates, and poor performance.

To make matters more complex, the COVID-19 pandemic has served only to exacerbate principal burnout because of the added transitions and demands that have accompanied school

closures, their reopenings, and the safety measures implemented to keep students and staff healthy (DeMatthews et al., 2021). Based on teacher leaders' helpfulness and increased productivity, the question becomes whether teacher leaders can help mitigate the stress and burnout that school administrators experience.  Through implementing a framework of distributed leadership and developing a culture of teacher leadership, teacher leadership can help mitigate this stress (Wells & Klocko, 2015).

## Teacher Attrition and Retention

Recruiting and retaining highly qualified teachers is one of the most important jobs of the school administrator. It is estimated that up to 16% of public-school teachers leave their schools each year, predating the COVID-19 pandemic (Harris et al., 2019). Fullard (2021) notes that teacher attrition has steadily increased since the pandemic of COVID-19 began in 2020, resulting in a mass exodus of administration and teachers. The question that has been repeatedly asked in the academic literature is how to keep good teachers teaching (Wenner & Campbell, 2017).

### *Teacher Attrition*

A great deal of investment and administrative effort goes into training and orienting a teacher to a new school (Kelchtermans, 2017). This investment of time and effort is most often worth protecting.  Perryman and Calvert (2020) argued that the pressures associated with accountability and the performativity culture in education are two of the primary factors that influence teachers to leave the profession. Performativity is the comparison of and judgments made against the ideal (Perryman & Calvert, 2020). Performativity culture evaluates teachers based on a high standard to ensure that teachers are performing at top efficiency (Perryman & Calvert, 2020). Performativity sets teachers up to be a "technical workforce to be managed rather than a profession to be respected" (Tomlinson, 2001, p. 36). This pressure along with the myriad

of other pressures that teachers face, often pushes teachers out of the teaching profession. Teachers leave the classroom for a myriad of reasons: to further their education, personal reasons such as pregnancy, the promise of better pay elsewhere, and school closings and reassignments (Young, 2018). The cost is not only associated with administrator time and financial impact but there is the great academic cost to the students themselves when they lose good teachers.

Another reason for teacher attrition is workplace conditions (Harris et al., 2019). These conditions include the percentage of minority populations in the school (Carver-Thomas & Darling-Hammond, 2019), leadership and collaboration (Nyugen et al., 2019), and any number of other factors. It has been proposed that administrative support, though, is the most significant predictor of teacher attrition (Carver-Thomas & Darling-Hammond, 2019).

Instructional continuity is important; students learn best when there is instructional continuity and an established learning-focused community (Gallant & Riley, 2017; Newberry & Allsop, 2017). What is clear is that there is a need for good teachers to stay in the classroom, and there is a substantial cost associated with losing good and qualified teachers that must be considered and guarded against.

Arviv Elyashiv and Navon (2021) set out to understand the economic explanations for teacher attrition by applying Sorensen and Tuma's (1981) resource-reward theory. The theorists posited that employees systematically weigh and try to balance between their personal resources, such as human capital, and the rewards of the job, such as promotions, autonomy, prestige, and salary (Sorensen & Tuma, 1981). Those with higher-quality resources will tend to leave, and those who receive the highest rewards will tend to remain in their position (Sorensen & Tuma, 1981). Arviv Elyashiv and Navon (2021) found that, in general higher levels of resources and lower levels of formal rewards are more likely to lead to an early exit, especially in the beginning

years of teaching. Teacher leadership may provide some extra rewards for teachers to entice them to stay in the field of education longer.

### Teacher Retention

Retaining good teachers is a complex task, but it is through an improvement of teacher working conditions, among other things, that movement can be made in this area (Pivovarova, 2018). Torres (2019) highlighted that distributed leadership positively correlated with teachers' job satisfaction. Perhaps embracing a framework of distributed leadership in some schools might be a way to rekindle teachers' love for teaching and keep them in the classroom where they can be of the most benefit to students and the community.

Many teacher interviews begin with questions that have roots in the often-implicit belief that specific psychological characteristics, such as self-efficacy, teachers' expectations, emotional intelligence, emotional labor, enthusiasm, and mindfulness, make teachers more successful in the classroom (Klassen & Kim, 2019). For example, initiatives aiming at fostering and maximizing mindfulness have increased (Klingbeil & Renshaw, 2018). With this in mind, increasing teachers' self-efficacy, defined as the "individual's beliefs in their capabilities to perform specific teaching tasks at a specified level of quality in a specified situation" (Dellinger et al., 2008, p. 754), stems from teacher burnout caused by emotional exhaustion, depersonalization, and lowered personal accomplishments (Bardach et al., 2022).

Teacher retention is significantly correlated with administrative leadership (Borman & Dowling, 2006; Brill & McCartney, 2008; Frahm & Cianca, 2021; Ingersoll, 2001; Jones & Watson, 2017; Kersaint et al., 2007; Swars et al., 2009; Wynn et al., 2007). Distributive leadership is one administrative leadership framework addressed thoroughly in this text. Extra work and teacher responsibilities are also associated with teacher attrition (Sulit, 2020). In

implementing distributive leadership, administrators need to help support teachers in balancing any additional leadership responsibilities so as not to overfill their plates (Sulit et al., 2020). Additionally, culture and climate and the opportunity to make a difference in their students' lives lead to teachers' retention (Sulit, 2020).

**Summary**

Teacher leadership is, in many schools, an untapped resource that has the power to change the direction of schools for the better in the United States. The educational system suffers from many ailments, such as principal burnout and teacher attrition, but teacher leadership has the potential to be able to chart a new course. It is not as simple as simply empowering teacher leaders, however. Teacher leaders must be adequately trained, supported, and supervised (Wieczorek & Lear, 2018). Care must also be taken to ensure that teacher leaders are not overburdened and overwhelmed with additional responsibilities (Sulit, 2020). Teacher leadership will flow naturally from principals who invest time in building a distributed leadership framework that profits from the strengths of all team members instead of only a few within the school administration.

Instructional leadership takes on various forms, but it is most relevant in this study to understand the conditions of instructional coaching and mentorship, which are often two of the primary duties of a teacher leader. Teacher leadership must be a carefully cultivated tool, and it is essential to hone teacher leaders' instructional coaching and mentoring abilities before letting them loose on unsuspecting novice teachers. In addition, PLCs were discussed as another means of helping teachers to bear the burden of student achievement as a group rather than all alone behind closed doors.  These three types of instructional leadership are just a few of the ways that teacher leadership can be enacted in schools.

Teacher leadership was also discussed in detail, including the development of teacher leadership, the positive impact of teacher leaders, the inhibiting factors of teacher leadership, necessary conditions for teacher leadership, perceptions of teacher leadership, and hybrid teacher roles. As more and more school administrators and districts have fully embraced teacher leadership as a means for school reform, understanding these topics as a means to change education from the inside out has grown.  Teacher leaders have the potential to bring new life to a classroom, a hallway, and a school.  It is necessary, though, for school administrators to do the essential work of building an environment in which these teacher leaders can thrive and make big educational moves for all students.

Teacher attrition and principal burnout are well-studied topics in education, but less is known about teacher leadership. Teacher leadership is rarely discussed in many schools though its potential to improve educational outcomes and job satisfaction for both teachers and school administrators is immense. This study seeks to understand better the lived experiences of teacher leaders in a rural secondary school.

By capturing the essence of teacher leadership as teacher leaders experience it, it is hoped that there will be moving toward the elusive accepted definition of teacher leadership and a filling of the gap in the literature about what exactly constitutes teacher leadership and how it is enacted. As quality teacher retention gets more and more complex, teacher leadership offers the possibility for those who are interested in stepping up and find fulfillment and purpose in being an active agent of change both inside their classrooms and outside. Still, there is a balancing act that must be considered when implementing teacher leadership and adding the additional duties of a teacher leader to their already full plate. The work required and the effort needed are a small

price to pay, though, for student learning and increased student achievement.  Every single

educational effort is taken on with these goals in mind, and in this case, it is a worthy endeavor.

**CHAPTER THREE: METHODS**

**Overview**

This transcendental phenomenological study aims to understand teacher leaders' lived experiences as they serve teacher leadership roles in a rural secondary school setting. Multiple teacher leaders at multiple high schools were interviewed to gain perspective on various experiences. These interviews served the purpose of helping to distill the experience of these participants into the essence of teacher leadership. This data analysis process occurred through transcription of the interviews and finding significant emergent statements that led to experiential themes. This study helps to describe the phenomenon of the experience of teachers as they serve in a teacher leadership role. Chapter three outlines the study's design, including research questions, setting, participants, procedures, the researcher's positionality, procedures for recruitment, data collection, data analysis, trustworthiness, ethical considerations, and summary.

**Research Design**

The purpose of phenomenology is to understand the "common meaning for several individuals of their lived experience of a concept or phenomenon" (Creswell & Poth, 2018, p. 75). The focus should be on what all participants in the study have in common in their experience of a particular phenomenon (Creswell & Poth, 2018). In this case, the purpose of this study is to better understand the universal essence of teacher leadership through questionnaires, interviews, and participant journaling.

Quantitative research allows the researcher to measure, at least in a shallow manner, the reactions of many people to a small set of questions (Patton, 2015). Thus, quantitative analysis allows the researcher to make broad and generalizable findings about a topic (Patton, 2015). Qualitative research, on the other hand, provides detail and depth that is not possible in

quantitative research (Patton, 2015). For the purposes of this study, qualitative methods were employed to understand in as great detail and depth as possible the experiences of teacher leaders as the practice of leading inside and outside of the classroom. Qualitative research is the most appropriate methodology because it emphasizes the "voices of the participants, the reflexivity of the researcher, a complex description and interpretation of the problem, and its contribution to the literature or a call for change" (Creswell & Poth, 2018, p. 8). Phenomenology was selected because it allows for a deeper study of an issue in education that has previously only been studied in a general manner.

Phenomenological research has philosophical origins based on the work of Husserl, Kant, Hegel, and Descartes (Moustakas, 1994). Based originally on the work of Edmund Husserl, a German mathematician, phenomenology is an especially favored research design in education, social and health sciences, and social and health sciences (Creswell & Poth, 2018). There are four philosophical presuppositions of phenomenology: a return to philosophy in the search for wisdom, a suspension of judgments until based on certainty, the intentionality of consciousness, and "the refusal of the subject-object dichotomy" (Creswell & Poth, 2018, p. 76). These philosophical origins are the underpinnings of phenomenological research.

I chose transcendental phenomenology because it seeks to gain a higher and deeper understanding of the essence of the lived experience of teacher leaders without the cloud of influence from my own experiences with the phenomenon (Moustakas, 1994). I considered heuristic phenomenology because of my rich experiences as a teacher leader, but I decided on transcendental phenomenology because I value the process of Epoche that Moustakas outlines to set aside my preconceived notions and biases to be able to see the phenomenon as if for the first time.

To understand the essence of teacher leadership as a phenomenon and to better understand the subjective and objective experiences of teachers in positions of teacher leadership, this research was conducted through in-depth, multiple interviews of peer-nominated teacher leaders (Creswell & Poth, 2018). Based on the interviews, significant statements were analyzed from the themes generated (Patton, 2015). A textural description was written from the significant statements to show how the setting influenced the participant's experience of the phenomenon (Patton, 2015).

## Research Questions

Based on Gronn's (2002a) three patterns of distributed leadership, the theoretical framework, these research questions seek to elicit a clear picture of what teacher leaders experience in their formal and informal teacher leadership roles. These questions begin with the central research question that mirrors the purpose statement and then move from more informal teacher leadership experiences to more formal ones.

### Central Research Question

What are the lived experiences of teacher leaders as they serve in teacher leadership roles in rural secondary school settings?

### Sub-Question One

How do teachers describe teacher leadership experiences of spontaneous collaboration?

### Sub-Question Two

How do teachers describe their teacher leadership experiences of intuitive working relations?

### Sub-Question Three

How do teachers describe their teacher leadership experiences in institutionalized, formal structures?

## Setting and Participants

This study took place in the setting of three traditional rural high schools. Participants were selected based on their suitability for this study. The positionality of the researcher is also considered in the following section.

### Setting

The setting of this study was the three traditional high schools in a northern central county in North Carolina. This county was chosen because it is representative of the majority of rural counties in North Carolina, which can be understood to be less populous counties outside of urban population centers (U.S. Health Resources & Services Administration, 2021). No research has studied teacher leadership in a rural, secondary setting in the United States, so this is a gap that my research fills in the literature. The three high schools in the county are all similar in student composition, as explained below. One other high school in the county was not studied as it is an early college associated with the local community college.

To protect the identity and privacy of the schools being studied, each of them was given a pseudonym that will be used throughout the study. Northern High School has around 550 students (NC School Report Cards, 2023b). The NC School Report Cards (2023b) reports that 38.5% of teachers are considered effective, 7.7% of teachers in Northern High School are considered highly effective, and 53.8% need improvement (NC School Report Cards, 2023b). At Northern High School, 82% are considered experienced teachers, 17.8% are beginning teachers, and 9.9% are provisionally licensed teachers (NC School Report Cards, 2023b). At Central High School with around 600 students, 13.3% of teachers are considered highly effective, 53.3% are

considered effective, and 33.3% need improvement (NC School Report Cards, 2023a). In Central High School, 73.4% of teachers are considered experienced, and 26.7% are beginning teachers (NC School Report Cards, 2023a). At Southern High School with close to 700 students, 14.3% are considered highly effective, 64.3% of teachers are considered effective, and 21.4% need improvement (NC School Report Cards, 2023c). Finally, 80.9% are considered experienced, 19.1% are beginning teachers, and 8% are provisionally licensed (NC School Report Cards, 2023c). The organizational structures at all three schools are similar; both Northern High School and Central High School had a female principal and two assistant principals when this study was conducted (Northern High School, 2021; Central High School, 2021), while Southern High School had a female principal with three assistant principals (Southern High School, 2021).

The aforementioned information is important because it helps to understand the schools' composition and staffing. The number of highly experienced teachers and their level of qualification will directly impact the teacher leadership within each school. It is also important to understand how many teachers at each school are considered provisional or in need of improvement because this increases the need for instructional teacher leaders in that school. The organizational structure of each school is similar. Each school has a principal and several assistant principals who would traditionally do some of the work that teacher leaders might be able to do.

**Participants**

Creswell and Creswell (2018) advance that a qualitative phenomenology should have between three and ten participants. This study had ten participants as required by the Liberty University School of Education. This was the general guideline used in this study, but the approach of saturation was also considered. Saturation occurs when there is a cessation of new

data because all insights and new properties have been revealed (Charmaz, 2006). While

Charmaz (2006) focused on grounded theory, the idea of saturation also easily applies to this

phenomenological study. Participants in this study were core subject area teachers with at least

three years of experience in the public-school setting. Gender and age were not taken into

consideration in choosing participants as teacher leadership is not necessarily associated with age

or with gender.

<div align="center">**Researcher Positionality**</div>

As the researcher, it is important to understand my motivation for conducting the study:

my research paradigm or interpretive framework, my philosophical assumptions, and my role in

the research.  Creswell and Poth (2018) define interpretive frameworks as the beliefs, paradigms,

theories, or theoretical framework that guides the researcher brings to their research process.

The philosophical assumptions of ontology, epistemology, axiology, and methodology are all

fundamental premises that make up the interpretive frameworks of qualitative research (Denzin

& Lincoln, 2011).

**Interpretive Framework**

Social constructivism and pragmatism are the worldviews that help to shape my thoughts

around this educational issue. Creswell and Poth (2018) note that in social constructivism,

"individuals seek understanding of the world in which they live and work" (p. 24). These

multiple and varied meanings are more and more clearly defined as research uncovers

participants' views within the situation (Creswell & Poth, 2018). In my worldview, though, it is

not enough to simply understand the problem. There needs to be practical action taken to make

the world better. I have a pragmatic concern about understanding what works and finding the

solutions to the problems that we face in our everyday lives, especially when the well-being of

children is concerned.

## Philosophical Assumptions

My philosophical assumptions are based on my values and belief system.   Understanding philosophy in research helps to set the direction of research goals, the scope of training and research experiences, and the basis of the criteria for evaluating research decisions (Creswell & Poth, 2018). All researchers make philosophical assumptions, though sometimes not explicitly, as they undertake qualitative research; these axiomatic issues are about ontology, epistemology, and axiology (Denzin & Lincoln, 2011).

### *Ontological Assumption*

I conducted my research from an ontological philosophical assumption. Creswell and Poth (2018) stated that the "ontological issue relates to the nature of reality and its characteristics" (p. 20). In this phenomenological study, I was primarily concerned with understanding and presenting the experiences of teacher leaders to be able to study this important area further. The ontological viewpoint recognizes that there are multiple realities because of many kinds of people and situations (Creswell & Poth, 2018). I hoped to shed light on this phenomenon to champion the cause of teacher leadership in schools.

### *Epistemological Assumption*

The epistemological assumption considers how knowledge is constructed (Creswell & Poth, 2018). The researcher gets as close to the subjects of the study as possible in the field where the participants work and live to best understand the context of what they are saying (Creswell & Poth, 2018). Minimizing the distance, or 'objective separateness,' as Lincoln and Guba (1988, p. 94) call it, is the goal of the researcher.  In my study, I worked alongside some participants and in the same district as all others.  This closeness helped me understand my

participants' context most clearly.

### *Axiological Assumption*

The axiological assumption recognizes that every researcher brings their values to their study (Creswell & Poth, 2018). Axiologically, the researcher, identifies his or her position concerning the setting's context (Creswell & Poth, 2018). These include the researcher's gender, age, race, personal experiences, professional beliefs, etc. (Berger, 2015). The researcher admits their role in interpreting the study's subjects and data collected (Creswell & Poth, 2018). In my research, I readily admit that I am personally invested in the school and district that I studied in my research, and I was very aware of my voice, bias, and interpretation as I proceeded.

### Researcher's Role

My interest in this topic of teacher leadership developed over the years out of my own experiences as a teacher leader. I was employed two years ago at Northern High School as an English teacher, and I engaged in teacher leadership activities at that school since at least 2012. In my position, though, I had no authoritative power over anyone participating in this study. Currently, I am the assistant principal at an elementary school in this same school district.

The assumption I brought to the study was that teacher leadership, while taxing, can be a fulfilling part of the teacher's job. It can motivate teachers to stay in the teaching profession even when the he or she is highly qualified to move up into school administration. That has certainly been the case for me. As the researcher, I needed to bracket my own experiences as a teacher leader as much as possible to interact in hermeneutic phenomenological interviews with the participants to construct objective understanding of the experience of teacher leadership (Lauterbach, 2018).  As the human instrument in this study, it is essential to disclose that I worked at one of the high schools studied for 17 years.  In several cases, the teacher leaders at

this site are my former colleagues. I kept a reflective journal to record my understanding of the experience of teacher leadership to compare my understandings to the constructed insights gathered from the participants' interviews (Creswell & Poth, 2018).

**Procedures**

The first step in the research process was to secure approval for the study from the school district. I sent a letter via email to the district detailing my study and followed up with a phone call to answer questions that may arose. The approval of Institutional Review Board (IRB) was required next (see Appendix A). This study presents minimal risk to the participants, so this proceeded without issue. Study participants were first selected by using criterion sampling. The school district liaison approved the recruitment letter via email detailing the criteria for participation for distribution to the principals of each of the three high schools. The principals provided a list of teachers in their school who they deemed to meet the study's criteria. The researcher then, with the principals' approvals, reached out to the participants via email. Participants were asked to participate in an interview and focus group, and to journal about their experiences serving in the role of a teacher leader. I obtained a signature of consent from each participant before proceeding with any further study (see Appendix B).

From a sample pool of 38 teachers at Northern High School, 34 teachers at Central High School, and 25 teachers at Southern High School, four teachers from each studied high school will comprise the sample of teacher leaders for this study. These teacher leaders were chosen by criterion sampling. The school district was to be provided with a recruitment letter that details the criteria for being considered to participate in this study. This letter was given to possible participants by the researcher with the permission of the principal, who was able to determine in advance whether the criteria were met. Of those teachers given the letter, teachers then agreed to

participate or not based on their interest. The criteria for participating in the study included that the participant had experienced the phenomenon, was interested in the topic, and was willing to participate in the interview, focus groups, and journaling (Moustakas, 1994).

Phenomenological interviewing is a particularly useful data collection method to be able to explore the issue and create an understanding together through conversation because it involves open-ended questions that are merely a launching point for the participant to share his or her experiences (Lauterbach, 2018; Moustakas, 1994). This study used a semi-structured interview process. This type of interview allows the interviewer to engage in conversation with the interviewee to help construct meaning around his or her memories. The interview was extensive and lasted around an hour each (Moustakas, 19940. Open-ended questions were prepared in advance, but the interviewer allowed the necessary flexibility to engage with the participant in a way that best elicited the most thorough responses (Moustakas, 1994). The interview questions were field tested before the first round of interviews ensuring that the questions were clear and thorough (Creswell & Poth, 2018).

Interviews were transcribed, and I conducted a line-by-line analysis of the transcriptions looking for significant statements about teacher leadership, including the definition, autonomy, autonomy, accountability, and capacity (Creswell & Poth, 2018). I implemented Moustakas's methodology of transcendental phenomenology, which involves moving through the core processes in deriving knowledge, which are Epoche, Transcendental-Phenomenological Reduction, and Imaginative Variation (Moustakas, 1994). Epoche is the setting aside of the preconceived biases, judgments, knowings, and understandings necessary to gaze solely on what is being studied with fresh eyes (Moustakas, 1994). It was imperative that I understood what I brought to the study with my own experiences and bracketed my own experiences to ensure that

my findings are valid for my study. Moustakas (1994) describes this process of Epoche as setting aside all the encumbrances of human predispositions to look at the phenomenon "as if for the first time" (Moustakas, 1994, p. 85). The next step in phenomenological reduction is to describe both the phenomenon being studied in textural language and "internal acts of consciousness… the rhythm and relationship between phenomenon and self" (Moustakas, 1994, p. 90). These significant statements were used to develop the themes of the interviews and construct the essence of the teacher leadership experience (Creswell & Poth, 2018). The descriptions, the processes of which are called horizontalizing, are equal in value in the beginning, the irrelevant, repetitive, and overlapping statements of description are deleted, and the remaining are clustered into themes (Moustakas, 1994). These cluster themes were then organized into a coherent textual description of the studied phenomenon (Moustakas, 1994).

Finally, Imaginative Variation occured when the researcher derived structural themes from the textural descriptions revealed in the previous part of the process (Moustakas, 1994). In this step, the structures of "time, space, materiality, causality, and relationship to self and others" is imagined and understood as infinite possibilities that are connected with the essences and meanings uncovered in the research (Moustakas, 1994). These structural themes and the textural differences were then unified into a statement of the essence of the experience of the phenomenon holistically (Moustakas, 1994).

**Permissions**

The first step in securing permission for my research study was to submit my proposal to the Institutional Review Board (IRB) to gain permission for my study to proceed (Appendix A). Once IRB approval was obtained, I needed to get permission from the school district to conduct my study in the four three comprehensive high schools.  At that point, I secured the permission

of each of the three school principals.

**Recruitment Plan**

Three to four participants were chosen from each of the studied high schools for a total sample size of 10 participants. An appropriate sample size for a phenomenological study is five to 25 participants (Creswell & Poth, 2018). The participant pool was ultimately determined by the level of saturation (Patton, 2015). Saturation occurs in research when no new information is likely to emerge from the addition of new participants (Patton, 2015). Although 12 participants were anticipated, the final determination of how many participants was ultimately dependent on saturation rather than a requisite number. Participants will be presented with information and documentation about informed consent prior to their participation in this study (see Appendix A).

From a sample pool of 38 teachers at Northern High School, 34 teachers at Central High School, and 25 teachers at Southern High School, three to four teachers from each studied high school comprised the sample of teacher leaders for this study. These teacher leaders were chosen by criterion sampling. The school district will be provided with a recruitment letter that details the criteria for being considered to participate in this study. This letter was emailed to possible participants by the researcher with permission from their principals, who were able to determine in advance whether the criteria were met. Of those teachers given the letter, teachers then agreed to participate or not based on their interests. The criteria for participating in the study include that the participant had experienced the phenomenon, was interested in the topic, and was willing to participate in the interview, focus groups, and journaling (Moustakas, 1994).

## Data Collection Plan

Data collection was conducted in various ways to capture the essence of the experience of teacher leadership. The primary form of data collection was interviewing. This is the most

common methodology of data collection in previous qualitative research studies (Nguyen &

Hunter, 2018). The participants also kept a journal of their reflective thoughts about teacher

leadership and what teacher leadership looks like throughout their normal work schedule.

## Semi-Structured Individual Interviews

Interviewing is one of the most common methods of data collection in qualitative

research (Creswell & Poth, 2018). Patton (2015) says, "The purpose of qualitative interviewing

is to capture how those being interviewed view their world, to learn their terminology and

judgments, and to capture the complexities of their individual perceptions and experiences" (p.

442). In this study, the interview questions were grounded in the current literature about teacher

leadership (Creswell & Poth, 2018). Questions were field tested with a pilot group of teachers

outside of the group of participants to ensure clarity and thoroughness (Creswell & Poth, 2018).

After collecting necessary demographic data (Creswell & Poth, 2018), the interview was

comprised of thirteen questions. After participants were identified, interviews were scheduled for

each participant. After consent was obtained, the interviews took place via Zoom for safety and

recording purposes. This allowed the participants the most minor inconvenience possible, but

audiovisual will be maintained. Interviews were be recorded and transcribed. Transcription was

done through software, but I personally verified the transcriptions to ensure quality transcription

(Creswell & Poth, 2018).

### *Semi-Structured Interview Questions*

1. Please describe your educational background and career through your current

   position.  CRQ

2. In what ways do you see yourself acting as a teacher leader? CRQ

3. What are some of the activities in your position related to teacher leadership? CRQ

4. What are the positive aspects of teacher leadership, the things that keep you motivated to continue leading? CRQ

5. What are the negative aspects of teacher leadership, the things that make you want to give it up? CRQ

6. How would you describe your experience of leadership in spontaneous collaboration while serving as a teacher leader? SQ1

7. How would you describe your experience of developing intuitive working relations while serving in the teacher leader role? SQ2

8. How would you describe your experience in formal institutional leadership structures? SQ3

9. We have covered a lot in our interview, and I sincerely appreciate the time you've spent with me. What else do you think is important for me to know about teacher leadership? CRQ

Questions one and two were demographic questions to understand the participants and his or her experience in teaching. These questions were adjusted as necessary based on the participant's responses to ensure that teacher preparation and experience were acquired. These questions were meant to open the conversation and get the participant talking. This built rapport in a non-threatening way to encourage thorough responses.

Questions three and four began to ask participants about teacher leadership. Wenner and Campbell (2017) highlight the ambiguity surrounding the term teacher leadership. This "muddiness," as they call it, makes it important to understand the personal perception and definition of teacher leadership of each participant (Wenner & Campbell, 2017, p. 135). It was important to ask, right at the beginning of the interview, what the participant sees as teacher

leadership, how it looked in their everyday work, and their initial reactions to the term as it may have been new to them.

Question five asked the participant to reflect on their experiences as a teacher leader. Participants were asked why they believe they were considered a teacher leader. This moved the participant from their theoretical definition of teacher leadership to a more personal and practical topic. Question six asked them to go into more detail about their activities that would be considered teacher leadership activities.

Participants were then be asked about the positive and negative aspects of being a teacher leader in questions seven and eight. Although teacher leadership has many positive benefits, some issues and problems arise from being a teacher leader (Wenner & Campbell, 2017). The participants were asked to detail some of the positive and negative aspects of teacher leadership to better understand how it affected their work life.

Questions 9 through eleven were based on the study's theoretical framework. Gronn (2002a) noted that three patterns of distributed leadership inevitably emerge.  These move from more spontaneous collaboration (Question 9) to more formalized leadership roles (Question 11).

Question 12 asked the teacher leader to provide any additional information that they may want to provide. This question allowed the participant to share anything that they felt was important that might not have been covered in any of the previous particular questions. Teacher leaders could offer any information they thought might be valuable. This study centers on the experience of teacher leaders, so this question was vital.

### *Semi-Structured Individual Interview Data Analysis Plan*

Before interacting with the data, I used phenomenological Epoche, the process of looking at the subject without prejudgment or bias (Moustakas, 1994). It includes being transparent to

allow whatever preferences the researcher might have to be pushed aside, and the subject to be viewed with fresh perception (Moustakas, 1994). Afterward, each of the interviews were reread to give a holistic understanding of the participants' experiences (Casterle et al., 2012). Then the researcher made a list of every statement relevant to the participant's experience, which Moustakas (1994) calls horizontalization. All non-repeating and non-overlapping statements were listed, and these invariant meaning units were clustered into themes (Moustakas, 1994). These invariant meaning units and their themes were then synthesized into a "description of the texture of the experience," including verbatim examples (Moustakas, 1994, p. 122). A composite textural description representing the collective group of participants was developed (Moustakas, 1994). Moustakas calls this process phenomenological reduction (1994). The composite textural description was then synthesized with the experience of the researcher, and synthesis was produced of the meanings and essences of the experience of teacher leadership are produced (Moustakas, 1994).

**Journals**

Participants were asked to keep a journal of the teacher leadership activities that they participated in during the course of their work schedule. Journaling, or memoing, is an effective form of data collection, especially as a supplement to interviewing as the primary means of data collection (Creswell & Poth, 2018). Journaling is intended to help participants be reflective on all the activities that they do that could be considered related to teacher leadership. This journaling also helped the participants to be reflective on their feelings that arose as a result of their teacher leadership participation. I expected to capture a comprehensive list of teacher leadership activities that the teacher leaders engaged in as well as their real-time reactions to their engagement in these roles. Each participant was given a copy of the journaling prompts with

instructions on how he or she should complete and return them (see Appendix E).

### *Journal Analysis Data Analysis Plan*

The journal data was analyzed similarly to the interview data. After the process of Epoche, the researcher listed every statement relevant to the experience of the participant (Moustakis, 1994). All non-repeating and non-overlapping statements were listed and those invariant meaning units were clustered into themes (Moustakas, 1994). These invariant meaning units and their themes were then synthesized into a "description of the texture of the experience," including verbatim examples (Moustakas, 1994, p. 122). A composite textural description representing the collective group of participants were developed (Moustakas, 1994). This phenomenological reduction process gave clarity as the phenomenon was viewed again and again with renewed attention (Moustakas, 1994). The composite textural description was then synthesized with the experience of the researcher, and synthesis was produced of the meanings and essences of the experience of teacher leadership were produced (Moustakas, 1994). This data analysis often revealed the context and process of anecdotal data (Patton, 2015).

### Focus Groups

Patton (2015) defines a focus group as a small group of six to ten people from similar backgrounds who are interviewed together in a one to two-hour interview. What makes focus groups so valuable is that participants can hear what their peers say in the group interview, and they can chime in to add additional pertinent information (Patton, 2015). The advantage of the focus group over the individual interview is that the researcher can observe the group interaction on the studied topic (Morgan, 1997). Following the individual interviews with focus groups allows the researcher to follow up on issues that came up during the analysis of the individual interview data collected (Morgan, 1997). Although it is a form of interviewing, focus groups

were used to deepen the researcher's understanding of the phenomenon being studied. The interactions between the participants only served to strengthen the quality of the data being collected (Patton, 2015). Kamberelis and Dimitriadis (2013) note that it is through the group dynamics, conflict, and even contradiction that focus groups yield data that would be otherwise "buried if tensions and attempts to address them were not allowed to occur" (p. 68). Based on Patton's (2015) use of focus groups, focus group will not be derived until after initial data analysis from the interviewing process to allow for data analysis of individual interviews to yield topics most important to the discussion in the focus groups. Open-ended prompts were generated based on the analysis of individual interview data to encourage "richer and more complex conversation that often result in significant learning and political activity (Kamberelis & Dimitriadis, 2013, p. 70).

The focus group participants were comprised of those teacher leaders who first participated in the individual semi-structured interview process. This allowed for the follow-up to issues raised in the analysis of individual interviews (Morgan, 1997). These participants, thus, met the same criterion-based requirements that were implemented for the interview participants. Each focus group were made up of four to five participants. Smaller focus groups work best when the topic is of interest to those being interviewed and are respectful of each other (Morgan, 1997). The teachers were asked to participate in a focus group randomly organized from the group of participants selected for interviews. The decision not to have additional focus groups was made as focus groups progress, though, because it will be necessary to determine saturation before determining exactly how many focus groups should be held (Morgan, 1997). The focus groups had moderate levels of moderator involvement (Morgan, 1997). A typical focus group

discussion takes between one and two hours, and only a few topics were be explored to maintain focus (Morgan, 1997). The focus group discussions lasted for more than an hour.

***Focus Group Questions***

Based on Patton's (2015) use of focus groups, final iteration of focus group questions was not derived until after the initial data analysis from the interviewing process. Possible focus group questions included (included also in APPENDIX D):

1. Please state your name and tell me your favorite thing about being a teacher leader.  CRQ

2. What are the positive aspects and perks of being a teacher leader? CRQ

3. What are some of the negative aspects of being a teacher leader? CRQ

4. Why do you continue to be a teacher leader despite these negative aspects? CRQ

5. Describe a time when you engaged in spontaneous collaboration as a teacher leader. SQ1

6. Describe how you engage with your colleagues as a teacher leader on a normal, unguided basis? SQ2

7. Describe your experience with formal, institutionalized teacher leadership opportunities. SQ3

8. Based on your interview, as you have experienced teacher leadership, what do you think you add to your school's leadership as a whole? CRQ

These questions were designed to help facilitate a discussion of teacher leadership between the focus group participants. Questions began centered around the central research question and eventually get into the specifics of the sub-research questions.  The most important aspect of these focus group questions was to be conversational and to get conversation flowing between participants (Krueger, 1997). Additionally, sufficient time was allowed for participants to answer their focus group questions while also keeping on task and goal-oriented (Krueger, 1997).

Because the focus group was used as a means of triangulation of data following the individual semi-structured interviews, the questions were revised and modified after the initial data findings have been procured (Creswell & Poth, 2018).

### *Focus Group Data Analysis Plan*

The journal data was analyzed similarly to the interview data. Following the process of Epoche, the researcher listed every statement relevant to the experience of the participant (Moustakas, 1994). All non-repeating and non-overlapping statements were listed, and these invariant meaning units were clustered into themes (Moustakas, 1994). These invariant meaning units and their themes were then synthesized into a "description of the texture of the experience," including verbatim examples (Moustakas, 1994, p. 122). A composite textural description representing the collective group of participants is developed (Moustakas, 1994). This phenomenological reduction process yielded the composite textural description to then be synthesized with the experience of the researcher, and a synthesis was produced of the meanings and essences of the experience of teacher leadership were produced (Moustakas, 1994).

### Data Synthesis

Using the term data analysis implies that the whole is broken down into parts to be studied. Still, in phenomenology, the researcher attempts to better understand the essence of the whole phenomenon (Peoples, 2021). In this study, once data had been collected, the goal of data analysis was to better understand the essence of the teacher leadership experience. To get to this essence, the data analysis started with the management and organization of the data. Interviews were transcribed via transcription software and checked thoroughly to ensure correct and detailed transcription. Moustakas (1994) suggests horizontalization as the first step in data analysis; the researcher should list each expression used by the participants related to the phenomenon. In my

study, I took the transcription of each interview and questionnaire results and listed each expression of the phenomenon presented by each participant. Next, Moustakas recommends reduction and elimination to elicit invariant constituents, by which he means that two requirements should evaluate all listed expressions of the phenomenon: (a) "Does it contain a moment of the experience that is a necessary and sufficient constituent for understanding it?" and (b) "Is it possible to abstract and label it? If so, it is a horizon of the experience. Expressions not meeting the above requirements were eliminated. Overlapping, repetitive, and vague expressions were also eliminated or presented in more exact descriptive terms. The remaining horizons were "the invariant constituents of the experience" (Moustakas, 1994, p. 121).

The next step in phenomenological research data analysis was to eliminate any statements that did not meet the two requirements Moustakas (1994) outlined. Then each of the remaining invariant constituents was to be put into clusters labeled by the prevailing theme. I evaluated each listed expression by the two requirements above, and I was left with the invariant constituents, which were be organized into clustered and labeled according to the emergent themes. The themes and invariant constituents were then evaluated against the original transcription of the participants' interviews to ensure that they were expressed explicitly or compatible with the participants' original statements (Moustakas, 1994). I needed to go back to the original transcripts to ensure that the invariant constituents I found were validated by what the participant related. These invariant constituents were then reassembled into a "textural-structural description of meanings and essences of the experiences, incorporating the invariant constituents and themes" (Moustakas, 1994, p. 121).

The resulting thematic statements and invariant constituents were used to construct "phenomenologically sensitive paragraphs" (Van Manen, 1944, p. 61). For each participant, I

created a narrative that summarized each interview's emergent themes and invariant constituents. Finally, a composite description of the phenomenon was written that encapsulated the meanings and essences of the phenomenon as described by the participants as a collective (Moustakas, 1994). This final step of the data analysis resulted in a coalescing of each of the individual interviews into a general description of the phenomenon (Peoples, 2021).

## Trustworthiness

Trustworthiness in qualitative studies is of supreme importance (Patton, 2015). It is only through stringent commitment to methodologically sound procedures for data collection and analysis, as well as researcher neutrality, that trustworthiness can be established (Patton, 2015). Patton (2015) states, "A credible, authoritative, authentic, and trustworthy voice engages the reader through the detailed description, thoughtful sequencing, appropriate use of quotes, and contextual clarity so that the reader joins the inquirer in the search for meaning" (p. 73). Through the processes described below, I doggedly pursued trustworthiness in my research into the experiences of teacher leaders as they serve teacher leadership roles in a rural, secondary school setting.

### Credibility

Sundler et al. (2019) define credibility as the "meaningfulness of findings and whether these are well presented" (p. 737). The method for ensuring credibility in this and any study is by presenting a thorough and transparent methodology for data analysis (Sundler et al., 2019). In this study, credibility was established through transparency of how the thematic analysis was conducted (Sundler et al., 2019). Clear and consistent descriptions were maintained throughout the study (Sundler et al., 2019). Quotations were given to ensure consistency of content and meaning in the study (Sundler et al., 2019). To this end, I needed to be transparent about the

thematic analysis process and give descriptions that clearly and consistently thread throughout the study. I also used direct quotations from participant interviews to ensure that my data analysis credibly reflects the participants' actual experiences. Credibility was also provided through the explanation of researcher bias and verification of the researcher's experiences, which was revealed in journaling and field notes (Peoples, 2021). I journaled and took thorough field notes about my thoughts and experiences of the phenomenon (Lincoln & Guba, 1985). This made explicit any bias I may have had so that it could be eliminated, and my study could be found credible (Lincoln & Guba, 1985). Prolonged engagement in the field, as well as the triangulation of data resulting from the three varied types of data collection, also contributed to this study's credibility (Lincoln & Guba, 1985). I ensured credibility primarily through triangulation, peer debriefing, and member checking.

**Transferability**

Transferability is showing that the findings may have applicability in other contexts (Lincoln & Guba, 1985), which is primarily achieved using thick descriptions when describing research findings (Geertz, 2008). Transferability refers to the ability for findings from the context of your study to be applied to another context or within the same context at another time (Lincoln & Guba, 1985). It is essential to acknowledge that the researcher can only create the conditions for transferability but cannot assure transferability: this judgment can only be made by the reader of the research. Transferability was ensured through thick descriptions of the experiences of teacher leaders. These thick descriptions will enable someone reading the study to make a determination about whether the transfer is possible to their context and situation (Lincoln & Guba, 1985).

**Dependability**

According to Lincoln and Guba (1985), seminal thinkers in the criteria for the evaluation of phenomenological research, dependability is the extent to which another researcher could follow the decisions made analytically by the study. This was achieved by ensuring that data collection and analysis are thoroughly detailed and straightforward to understand (Webb & Welsh, 2019). Confirmability is the degree to which the study is grounded in data to make inferences and drawn logical conclusions based on the evidence presented (Webb & Walsh, 2019). Dependability was ensured in this study because I thoroughly described data collection and analysis to the point that the study could be replicated by another researcher and the same findings found. I also ensured dependability using overlapping methods, a kind of triangulation (Lincoln & Guba, 1985). Using interviews, focus groups, and journaling, data should overlap and prove dependable. Using quotations in my description of each participant's textural description ensured confirmability. Dependability and confirmability were also addressed through rich, thick descriptions of themes, member-checks of the findings and interpretations, and a reflexive journal kept by the researcher (Creswell & Poth, 2018). An inquiry audit done by a third party of the research process used throughout the study will also ensure dependability and confirmability (Creswell & Poth, 2018). Transferability was also improved through rich, thick descriptions and discussions of the site, setting, and participants to ensure that studies conducted in similar settings would reach similar conclusions (Creswell & Poth, 2018).

**Confirmability**

Confirmability is a degree of neutrality or the extent to which the respondents shape the findings of a study and not researcher bias, motivation, or interest (Lincoln & Guba, 1985). Techniques for establishing confirmability include: (a) confirmability audits; (b) audit trails; (c)

triangulation; and (d) reflexivity. In this study, I kept a reflexive journal to help with the audit process (Lincoln & Guba, 1985). This audit process was made possible through thorough record-keeping of raw data, analysis products, synthesis products, process notes, reflexive notes, and instrument development information (Lincoln & Guba, 1985).

**Ethical Considerations**

IRB approval was the first step in ensuring ethical research. I gained approval from the site administrators before beginning any research. All data and records have been and will be secured and kept private for five years after the research study's conclusion and destroyed after the requisite period (Creswell & Poth, 2018). Informed consent was obtained from each participant (Creswell & Poth, 2018). Research conclusions were drawn from multiple perspectives to ensure no hidden bias (Creswell & Poth, 2018). Researchers must be careful not to disclose any information that would be harmful to the participants by protecting their identity and ensuring their confidentiality (Creswell & Poth, 2018). In my study, I was diligent about protecting the privacy and confidentiality of each of my participants. I was committed to ensuring that I did not use my position in the county and schools to recruit unethically.

<div align="center">

**Summary**

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The methodology presented here represents the best practices according to some of the foremost and trusted thinkers in phenomenological and qualitative research. Through carefully designed research questions, I conducted a hermeneutically phenomenological qualitative study to capture the lived essence of the experiences of teacher leaders. Careful data collection and analysis ensured that all conclusions were trustworthy in credibility, dependability, and transferability. Following the procedures of Moustakas, I collected my data through interviews, focus groups, and participant journaling. The following data analysis also followed procedures

established by Moustakas to break down the interview transcripts into their invariant constituents and then reassemble the invariant constituents into participant textural descriptions and then into general descriptions of the phenomenon itself. Trustworthiness, including credibility, dependability, and transferability, was ensured through careful attention to bias awareness, and adherence to stringent data collection and analysis procedures. Overall, this study resulted in a clearer understanding of the experiences of teacher leaders as they serve teacher leadership roles in a rural secondary school setting.

# CHAPTER FOUR: FINDINGS

## Overview

The purpose of this transcendental phenomenological study is to understand the lived experiences of teachers in leadership roles in a rural, secondary school setting. This chapter includes participant descriptions of the ten participants in the form of narrative description, a table, and by location. After discussion of the participants in the study, the results are presented through the study's research sub-questions aligning to the theoretical framework and the central research question for this study: What are the lived experiences of teacher leaders as they serve in teacher leadership roles in rural secondary school settings? The central research question and sub-questions will be answered through discussion of common themes identified across multiple data sources.

## Participants

Following the procedures described in the previous chapter, the sample group contained only certified teachers who had been teaching at least three years and are engaging in activities in at least one of the domains of teacher leadership. Four teachers from Northern High School, three teachers from Central High School, and three teachers from Southern High School participated in the study. Table 1 at the end of this section describes the collective demographic data of all participants in the study. After securing permission from the school district's central office, a letter was sent to the principal of each high school through email detailing the research study and the criteria for participants. The criteria for participation:

1. Have been licensed teachers for at least three years (or are in their third year of teaching)

2. Are engaging in any of the following activities:

a. Domain I: Fostering a collaborative culture to support educator development and student learning

b. Domain II: Accessing and using research to improve practice and student learning

c. Domain III: Promoting professional learning for continuous improvement

d. Domain IV: Facilitating improvements in instruction and student learning

e. Domain V: Promoting the use of assessments and data for school and district improvement

f. Domain VI: Improving outreach and collaboration with families and community

g. Domain VII: Advocating for student learning and the profession

**Abigail**

Abigail is a High School English teacher with 19 years of teaching experience. She has taught in two states, North Carolina and Virginia, and multiple school districts in various counties. She did not begin teaching until she was 30 years old after having careers as an emergency medical technician (EMT) and a technical writer. She has taught all levels and courses of English over the course of her career. Her teacher leadership experience began at Northern High School when a colleague came to her after she'd been working there for a while and told her that there were all sorts of opportunities to get involved with the school outside of the classroom. She noted that her previous high school was very large, and it was easy to fade into the background and to close the classroom door and be forgotten. Her colleague had recognized in her that she had a plethora of experiences and had much to offer the school outside of her teaching ability.

Abigail's teacher leader experiences include mentoring, coaching girls' soccer, and serving on the safety committee at Northern High School. She describes her primary motivation for continuing to engage in teacher leadership activities: "I want my I want my kids to have lots of opportunities, and I want them to be in a safe environment." Her experiences at other schools in other districts and states is helpful to her being a teacher leader because she is able to say, "Oh, you know, I was at this other school, and it didn't work. Please don't do that or maybe it'll work here because it's a different attitude or maybe if we took, you know, part of that program.  I get to be in the decision making a little bit more [as a TL]." Abigail noted that the main reason she did not begin to step into teacher leadership earlier in her career is that she simply was not asked to do so. She said, "If somebody hadn't said like three or four times that we have this or that need… I finally said, 'I think I can do that.' So sometimes I think you just need to go to somebody if you need a leadership position filled... I don't know there's a need or how I can help if nobody says anything."

**Karina**

Karina was the youngest of the teachers interviewed for this study with four years of teacher leadership. Karina came to Northern High School through the Teach for America program that solicits teachers from college graduates who are undecided in their future permanent careers. The program requires that they work for two years as a teacher at the school they are assigned, but Karina stayed on at Northern High School for an additional 3 longer than she was required at the time of this interview. Karina worked in the Exceptional Children's (EC) program at Northern High School as a resource and inclusion teacher and as the EC team leader at the time of the interview.

Karina described the isolation that is inherent and prevalent in the teaching profession. She said, "when you spend like all your time like stuck [without adult contact in the classroom], teacher leadership allows you to share what you've learned and really get into that collaboration especially in a district where so many of us are siloed off." Karina astutely pointed out the need for constant cultivation of TLs to always have a ready supply of leadership available in the school. Karina spoke of the loss of many TLs at Northern High School since the last school year through attrition. She emphasized the importance of developing and building capacity in TLs so as not be so dependent on a few and to be able to have a steady supply of able TLs when someone leaves.

**Rosalyn**

Rosalyn began her career as a substitute teacher at a local middle school. She then went on to teach English for a few years and then began to teach math, which she continues to teach today at Northern High School. Leadership is a natural skill for Rosalyn, and she describes being a leader among her peers as early as high school. She says, "Oftentimes, that's what I will do, if I can and if I am allowed to… I will just take charge." Rosalyn has had 26 years of teaching experience in this particular school district and most of them at his particular school.

She describes how there are things that need to get done in a school; she said, "People at some point know you will do it…. You have TLs who will do what is asked of them, but will they just take charge and handle it?" She noted that the responsibility of placed on TLs requires trust and a record of dependability. She said, "If you put the right people in charge, you don't have to think any more about it." She described the downside of being a TL: "Tired. It's just overwhelming sometimes like just today, I've had a peer observation, this interview, and then I've got to go do meeting with seniors at 1:45 all while then teach three classes and grading

papers and there's no incentive… other than mentor pay which is nothing really, there's no there's no added anything for doing it other than an occasional pat on the back, I guess."

**Wanda**

Wanda has taught for 20 years as a high school science teacher. She is one of the most veteran teachers at Northern High School where she started teaching after teaching for eight years in a neighboring school district. She began her teaching career as a lateral entry teacher and has taken on the challenge of expanding from science into the Project Lead the Way (PLTW) Biomedical course of study. She is one of the two senior advisors for her school, along with Rosalyn, who plans all senior activities and coordinates the graduation ceremony.

When asked about how she saw herself as a teacher leader, she said, "I am kind of the person that everybody goes to for everything." She was a formal mentor for several beginning teachers. She started the first girls' swim team ever at Northern High School, and she has continued to be the sole coach for that sport. She has also taken on the role of treasurer for the band boosters, though that role is primarily due to having a daughter in the band. One of the main hallmarks of the interview with Wanda was her exhaustion at being so overwhelmed with all of the additional tasks that she has taken on as a teacher leader.

**Noah**

Noah had been teaching for the last 21 years. He taught a variety of disciplines of science at Central High School, including physical science, chemistry, and physics. He has served as the department chair, sits on both the safety team and the school improvement team. He also spoke at length about how he served as a conduit between faculty and administration for concerns and suggestions.

Noah described his teacher leadership as being an example and a resource. "I am here every day," he said, "People know I have been here for a long time, and if they have questions, they can ask me." He talked about being at a point in his career when he was willing to do say what needed to be said to get things done that needed to be done: "I don't mind painting a target on my back as much as I used to mind (translation: I'll open my mouth and complain about things I think are worth pointing out.)"

**Maria**

Maria is in her eighth year of teaching and her second year at Central High School. She began teaching at an Early College charter school in another county, taught at another charter school in another county, and then came to her current placement at Central High School. At the time of the interview, she taught English to upper grades high school students. Maria took the job at Central High School because she was actively seeking opportunities to serve outside of her classroom walls and to grow professionally. She helped with local curriculum development, and she has begun the process of being trained to be a formal mentor for beginning teachers.

As a younger teacher, she was excited about the opportunities to help out her colleagues in more formal ways, but she already helped to informally mentor newer teachers and taking on other leadership roles as they are available to her. She said, "I do want those around me to be successful because they are having success… it will bleed over to other classrooms. It'll bleed out into the whole school." She spoke of teacher leadership as a means to build her professional resumé, which indicated that she may have intentions of pursuing more formal leadership positions in the future such as school administration.

**Andrea**

Andrea began her teaching career at Central High School as a long-term substitute for a teacher on maternity leave and has been teaching for the last 15 years. She's taught in middle school and high school science and social studies. At the time of the interview, she taught PLTW Robotics and Biomedical courses as well as other science courses.

Andrea's primary motivation for being a TL is that she enjoyed the collaboration that takes place in the role; "I get to collaborate with some very wonderful people both with the leadership and school improvement team and in my department." She noted that when she was able to help her colleagues, then that help spread to students. She said that she "modeled exemplary practices as best as I can. I am not perfect."

**Jaqueline**

Jacqueline began her teaching career as an elementary teacher and then went back to school to be a nurse. She was a health science teacher and a CNA instructor at Southern High School. She also worked as a clinical nursing instructor at a community college. She has been a teacher at Southern High School for ten years and has been teaching for 13 years in total. As a TL, she said that she has taken on many responsibilities including senior advisor, National Technical Studies Advisor, and has served as a mentor for the last five years. In addition, she served as the advisor for Health Occupations (HOSA) club and coaches track for the school.

Jacqueline described the motivating factor of helping teachers to improve. She said, "I think the main thing that keeps me motivated is that some people get it, and when they get it, then they actually appreciate the advice and the things and the tools that you have given them." She described how students sometimes show appreciation for all of her work within the school

outside of her classroom, and she said, "it's almost like that trumps everything." All of her work and effort, ultimately, was done on behalf of and for the benefit of her students.

**Aaliyah**

Aaliyah is in her tenth year of teaching at Southern High School. She was initially reluctant to label herself a TL, but she was flattered that her principal had considered her to be one. As she spoke, though, it became clear that she is in fact a TL and takes on many of the roles and responsibilities of a TL. She served on the leadership team and is a source of help for beginning teachers. She described providing her principal with feedback when solicited and offering suggestions when not solicited. She expressed her reluctance to be a TL when she said, "As far as volunteering for all the things, I am not going to be that person, but if somebody asks and I feel like I can do it, then I would definitely agree. I am not going to volunteer to do all the things." While answering the very next question, though, she described initiating conversations with new teachers at her school to see if she could be of assistance.

However reluctant of a TL she may be, Aaliyah said that she enjoyed being involved in things happening in the school and not just "being passive and letting things happen." She said, "I think those are the positives and then just building that experience of being a leader, I mean without taking on all of the stress that they have to take on because I don't want that, I don't need that in my life." She saw leadership as a formal role with a title, while she, though perhaps unwittingly, served her school as a TL in a positive way according to her record of activities and her principal's recommendation.

**Nathan**

Nathan is a social studies teacher at Southern High School and has been there for six years and has been teaching for seven years total. He described himself as "very much a lead by

example kind of person." He served the chair for his department even though he was not the most veteran teacher. He was a mentor to two beginning teachers, and he coached junior varsity volleyball.

He was passionate as he spoke about enjoying the challenges of teaching and being a TL. For example, he took on planning homecoming dance, which was something he had never done and felt uncomfortable doing. Even as he described the experience, he reflected on ways that he could improve that event when he plans it in the future. He is responsive to his mentees and their needs, adjusting to their level of neediness and desire for help.

**Table 1**

*Participant Demographic Information*

| Name | School | Gender | Race | School Size | Years teaching | Subject Taught |
|---|---|---|---|---|---|---|
| Abigail | Northern High School | Female | White | 585 | 19 | English |
| Karina | Northern High School | Female | White | 585 | 4 | Exceptional Children |
| Rosalyn | Northern High School | Female | White | 585 | 26 | Math |
| Wanda | Northern High School | Female | White | 585 | 20 | Science |
| Noah | Central High School | Male | White | 596 | 15 | Science |

| Maria | Central High School | Female | Multi-Racial | 596 | 8 | English |
|---|---|---|---|---|---|---|
| Andrea | Central High School | Female | White | 596 | 18 | Math |
| Jaqueline | Southern High School | Female | Black | 643 | 13 | Science |
| Aaliyah | Southern High School | Female | White | 643 | 10 | English |
| Nathan | Southern High School | Male | White | 643 | 7 | Social Studies |

Criterion sampling was used to high school teacher leaders from the three rural high schools from Northern North Carolina Public Schools. The three high schools represented are the only three traditional high schools in this school district. High school TLs were identified by their principals after receiving a letter through email delineating the criteria for a TL (See Appendix F). Each principal provided the researcher with four to five names of teacher leaders who met the specified qualifications, and the researcher, at the request of the principals, reached out to the teacher leaders to solicit for participation. Signed consents to participate were obtained from all three principals and from the ten teacher leaders who agreed to participate in the study process. The sample group included ten full-time, certified teachers with at least three years of teaching experience who were considered by their principals to be teacher leaders based on criteria. Pseudonyms have been assigned to each school and each participant to ensure the

confidentiality of settings and participants but will not be identified again as pseudonyms again to preserve readability. Gender and race of each participant were obtained in the interviews held virtually through Zoom. All school descriptions were obtained through the NC Report Cards published publicly for all North Carolina schools each school year (NC Report Cards, 2023).

## Results

In Epoche (see Appendix G), I examined my own experiences as a TL and what preconceived notions, biases, and assumptions my own experience might bring to my research. By engaging in this practice of self-reflection and self-understanding, I was able to clearly identify and bracket out my own biases and assumptions to ensure that researcher objectivity was evident.

Although this process of Epoche is described in detail in Appendix F, it is important to state that I was a teacher at Northern High School for eighteen years and served as a TL there for most of that time. I served under several generous leaders who worked with me to build my capacity as a teacher leader. The current principal there was my principal for several months before I changed positions and left the school at the end of that school year. In order to maintain a level of distance and see all participants through the same unbiased lens, I followed the same procedures with the participants of all three high schools. I asked all participants all interview questions and did my best to offer my own input as little as possible.

Multiple data points were examined, including interviews, focus groups, and journal entries, were analyzed to be able to triangulate data and increase reliability of the results. Semi-structured interviews, focus groups, and participant journals were analyzed and coded with the assistance of Atlas.ti qualitative software. Fries (2012) helpfully describes Atlas.ti qualitative software as a container that houses all research documents, data, quotes, codes, and memos.

Creswell and Poth (2018) note that computer programs (like Atlas.ti) are quite standardly used in qualitative research for over two decades, and these programs allow for transparency and easy replicability While Atlas.ti initially coded the transcribed interviews, focus groups, and journal entries, the researcher went through all assigned codes to ensure their appropriateness and to condense and clarify when necessary.

All interview transcripts, focus group transcripts, and participant journal entries were uploaded into the Atlas.ti software and then organized into groups according to participant demographics. All participant interview transcripts were read through multiple times and assigned a code to find all possible meaning units of the experience. The Atlas.ti software originally coded data. Atlas.ti uses an automated coding processes, AI Coding, Sentiment Analysis, and Opinion Mining, to process data and apply useful codes for later analysis. The suggested codes elicited from the artificial intelligence (AI) coding tool are only a starting point for thorough analysis; I studied all research data, reviewed all AI assigned codes and their associated quotations, and then modified for clarity as necessary. The research texts were read through again to make sure that codes had been assigned to all pertinent data units.

The codes that were generated from the AI- powered code suggestions were then reviewed, modified, and consolidated by the researcher for clarity. For example, through AI coding, codes were assigned for "Trait: Responsibility" and "Responsibility." These two codes were examined and found to contain mostly, but not all, overlapping quotations, so the code was merged into one for those two codes in the Atlas.ti Code Manager. Once AI coding had taken place, been reviewed, been and modified then the researcher read through all research data texts again to ensure that all nonrepetitive, nonoverlapping relevant statements had been coded with a concise and clear code that labeled the meaning unit of the experience in that statement.

After coding, codes were grouped into clusters for the purpose of determining emergent themes from the research (Figure 2). The clusters of invariant meaning units were then labeled with a relevant theme that emerged from the data analysis. These clusters naturally could be categorized into subthemes and then into broader overarching themes. For example, the codes describing the traits of TLs organically fit together under the theme of characteristics of TLs.

These themes were then unified into a description of the textures of the experience through thematic answering of the central research question and subquestions. This textural description was used to construct a structural description through the process of imaginative variation of the experience leading to the essences of the experience in the summary of this chapter. The structural descriptions begin to describe the why of the experience and to answer the question of how the experience came to be what it is. The researcher finds through the process of imaginative variation that "there is not a single inroad to truth, both that countless possibilities emerge that are intimately connected with the essences and meanings of an experience" (Moustakas, 1994, p. 99).

**Table 2**

*Codes, Themes, and Subthemes*

| Subthemes | Theme-Related Codes (frequency) |
|---|---|
| Theme 1: Teacher Leadership Requires Active Participation | |
| Active Participation in Other's Teaching Practice | collaboration (44) professional development (31) mentoring (29) helping/supporting (17) |
| Active Participation with Students Outside of the Classroom | communication (12) teamwork (10) decision-making (7) encourage (5) organization (5) time-management (5) |

| | |
|---|---|
| | advocacy (13) |
| Active Participation with School Administration | problem-solving (6) |

| Theme 2: Requisite Characteristics of Teacher Leaders | |
|---|---|
| Responsible and Trustworthy | leadership (65) |
| | responsibility (34) |
| | trusted (9) |
| | commitment (8) |
| Collaborative | empathy (5) |
| Driven and Coachable | motivated (7) |
| | self-reflection (7) |
| Big Picture and Future-Focused | planning (16) |
| | commitment (8) |

| Theme 3: Teacher Leadership Has Costs and Benefits | |
|---|---|
| The Toll of Teacher Leadership | frustration (25) |
| | uncertainty (17) |
| | stress (7) |
| | disappointment (5) |
| The Case for Teacher Leadership | appreciated (15) |
| | positive feedback (8) |
| | positive reinforcement (7) |
| | recognition (7) |
| | gratitude (6) |
| | empowerment (5) |
| | positive relationships (5) |

**Figure 1**

*Bar Graph of Code Frequency by Data Set Type*
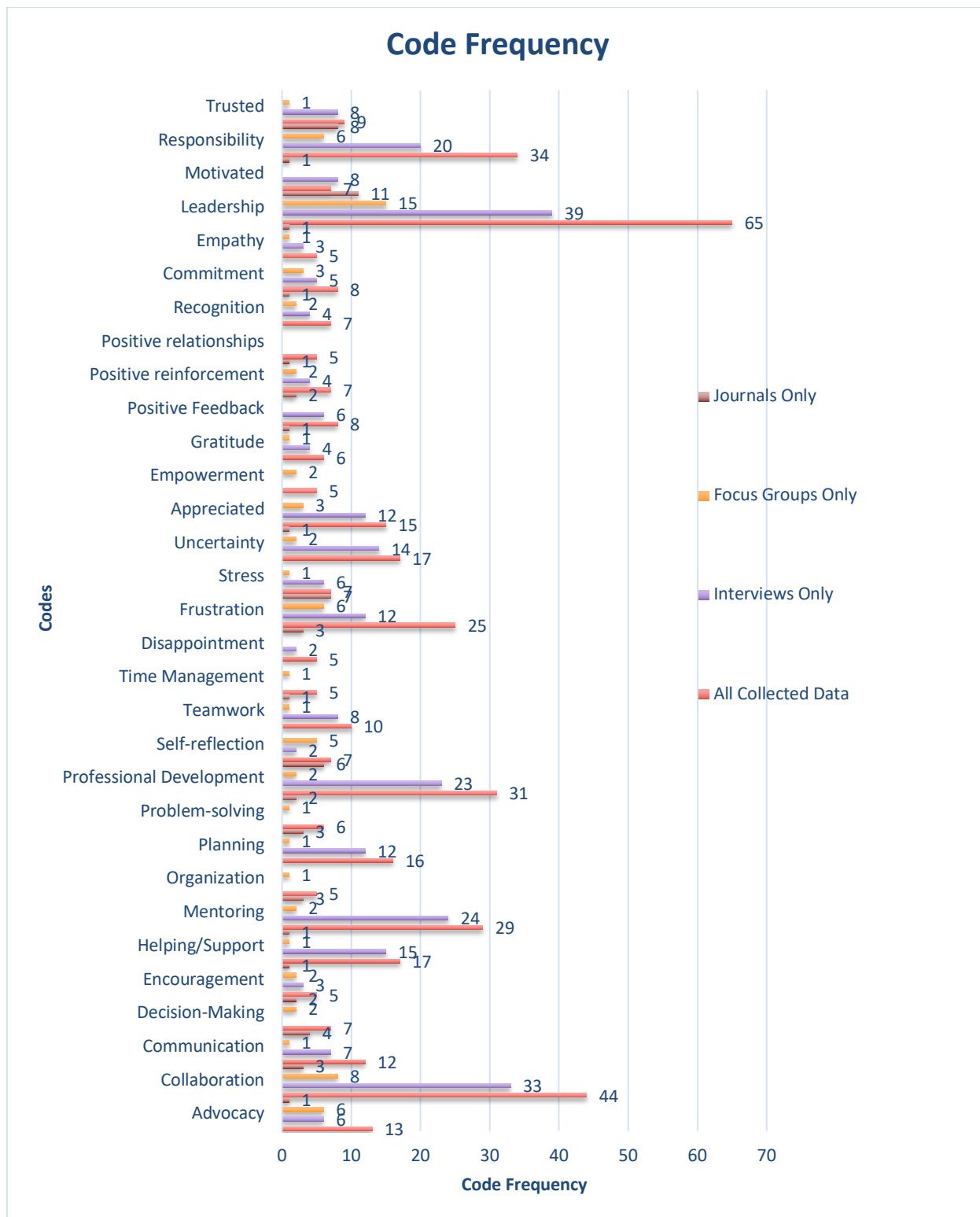
In Figure 1 above, the transcribed interviews, journal entries and focus groups were analyzed for units of meaning, or phrases that captured the experience of teacher leadership. Those meaning units were then coded, first through Atlas.ti and then by the researcher. The Table shows the most prevalent codes (those with a frequency of five or more). Data was triangulated using multiple data points. Data points include the individual semi-structured interviews, focus groups, and journal entries. By ensuring that multiple data points were collected and analyzed for each participant, data triangulation and saturation were achieved.

In vivo quotations in the following theme and subtheme descriptions are taken from different data points. The interviews gave participants a chance to verbalize and think through their thoughts on different TL topics. The focus group generated more ideas through collaboration and conversation, while the journaling allowed participants a chance to privately and contemplatively reflect on their experiences as a TL in their own time. Figure 2 below displays a doughnut map with all data sets combined on the outside, the interviews next, then the focus groups, and finally the journal entries. In this graph, there is a similar distribution of codes between data sets. This visualization shows a clear triangulation of data between collection methods.

**Figure 2**

*Doughnut Map of Code Frequency in All Data Sets*
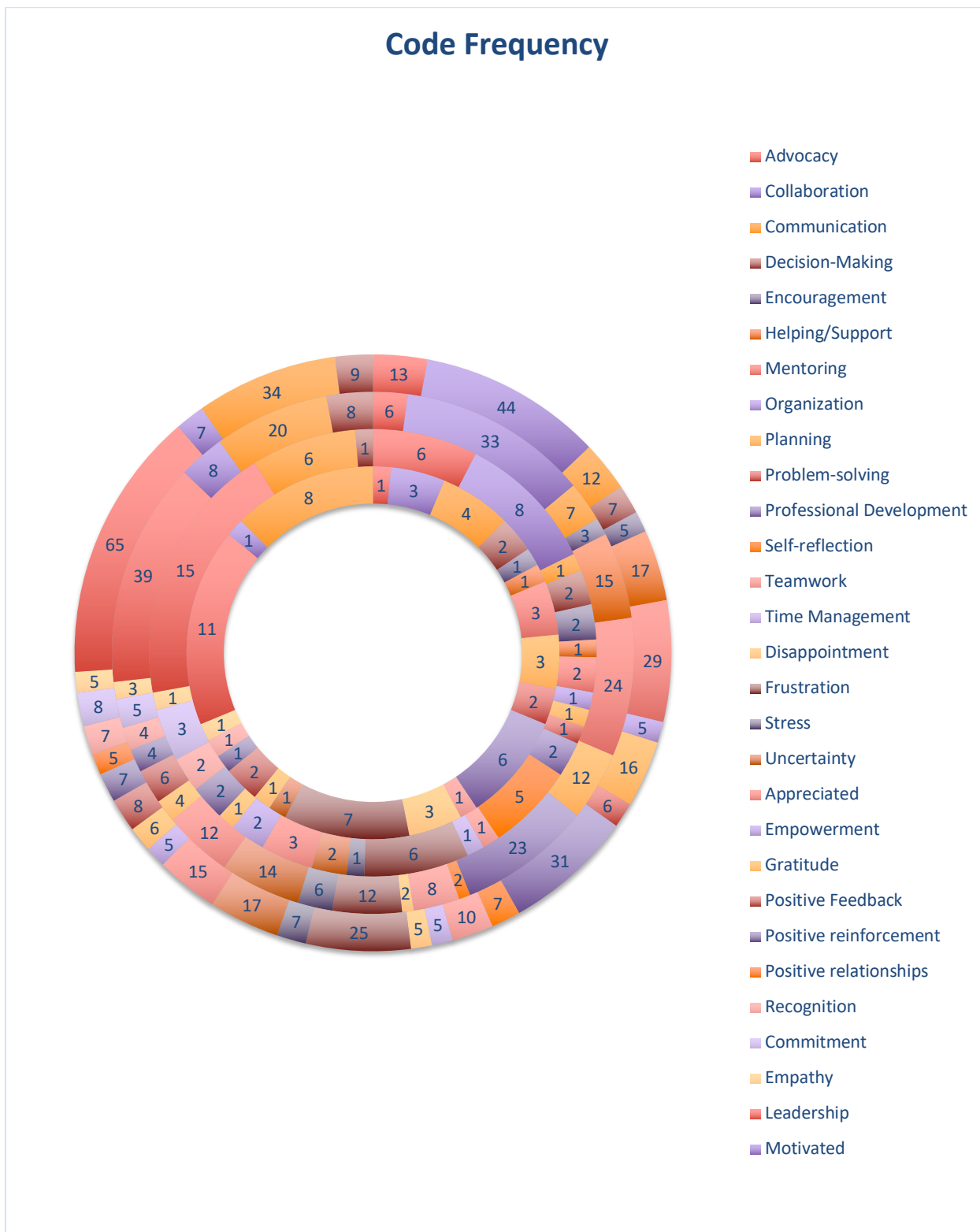
**Teacher Leadership Requires Active Participation**

The overarching theme emerging from data analysis was that leadership is not simply a status or designation but rather a time-consuming, energy-consuming activity in which the TLs participated daily. This is seen in their personal evaluations of their own school administration. Aliyah from Southern High School noted in her interview that there was nothing positive to note about her principal's leadership style and noted that he spent "a lot of time in his office. A lot of time." This lack of activity on the part of the principal was indicative of a lack of leadership according to the TL as leadership is associated with active engagement. Aliyah also described leadership as "not just being passive and just letting things happen… you could say you try to do something, you spoke up, you tried to volunteer to help out." Again and again participants described the activities in which they participated to begin to define what teacher leadership looked like in their own school rather than teacher leadership itself. This is because teacher leadership requires active participation in other teachers' teaching practices, with students outside of the classroom, and with school administration just as leadership requires active participation by school administrators.

*Active Participation in Other Teachers' Teaching Practice*

Every single TL talked extensively about helping and offering support to other teachers. Many of those interviewed worked with new teachers in a formal context like mentoring, while all discussed how they organically assisted the teachers who were near them in the building.  TLs talked about reaching out to new teachers just to offer support and help. In her interview, Maria summed up the sentiment of all participants: "I mean people seem to talk to me about things so then I will in turn take that information and… try to help solve whatever issues they are currently facing."

*Active Participation with Students Outside of the Classroom*

The job of the teacher is to work with students to improve educational outcomes. Several of the TLs I interviewed had students in their classrooms during their planning periods who did not have another class or place to be during that time. TLs go above and beyond their teaching duties inside the classroom for the benefit of their students by coaching sports, leading student clubs and organizations, and a plethora of other duties. Abigail, who coaches a girls' sport, told me in our interview that she cooks them lunch in her room on Mondays and calls it Lunch with Coach. She said that by feeding them, "I know that they're eating something before a game. But not only to get their brains going in the classroom but outside of the classroom as well because they can't learn if they're hungry." TLs do not necessarily all cook lunch for their students, but they do all seek to serve the whole child both inside and outside of the classroom.

*Active Participation with School Administration*

It is no surprise that TLs are often called on by their school administrations to participate in distributed leadership opportunities and to serve their school as a whole. The TLs interviewed served on school improvement teams and on various committees with the goal of school improvement in one area or another. Noah explained in the focus group felt that being involved in the decision-making process, especially in school improvement efforts "gives me a clarity over… this is why we're doing the things we're doing because I can see the bigger picture, and I don't think a lot of my colleagues always see that, and I usually try to tell others that when I do see it."

**Requisite Characteristics of a Teacher Leader**

Not every teacher naturally possesses the characteristics that are needed to be an effective TL. This capacity often needs to be developed in teachers purposely and systematically. While

there are many traits and characteristics of a good TL, the following are considered to be among the most prevalent in this study: responsible and trustworthy, collaborative, driven and coachable, and big picture and future-focused.

### *Responsible and Trustworthy*

Teachers who are endowed with rights and responsibilities of TLs must be responsible and trustworthy. Often there are conversations that take place that require confidentiality, and the school administration must have confidence in the TL that that confidence will be kept. The TL must also be able to be trusted with tasks and responsible to get done the work assigned to him or her. Jacqueline echoed her TL peers in her journal entry when she said that "to whom is given much is required, and they require a lot just of me because I am just a person who shows up and just does the job I have been given to do."

### *Collaborative*

Leaders can only be leaders if people are willing to follow them. TLs must move out of the mindset of doing everything alone even though it is sometimes quicker and simpler to do it that way.  Collaboration is the method by which TLs share their expertise and move the needle for people outside of their classroom walls. TLs quite often describe the experience of collaborating with newer teachers in an informal capacity; Maria described a common phenomenon among the participants of this study in her interview: "My teacher neighbor and I have a lot with lesson planning, and I am unofficially helping her get on her feet, mentoring her with curriculum design, lesson planning, parent contacts, and parent communication." The TLs interviewed almost all described how they naturally found themselves in subject or proximity groups collaborating on lesson planning and resolving student issues.

### *Driven and Coachable*

Being a good TL requires that the teacher have initiative and be willing to go above and beyond what is strictly required. The TL knows that if things are to get done, then someone has to do them, and goes out of his or her way to be helpful and find solutions for problems before anyone even points out the problem. They have to be willing to do things in a way that aligns with the school's mission and vision as well as the principal's leadership style. Abigail stated in the interview that she engaged in TL activities "because I want my school to be the best it can be. I want my kids to have lots of opportunities, and I want them to be in a safe environment…. I get to make that change happen."

### *Big Picture and Future-Focused*

TLs are required to be concerned about things outside of the walls of their own classrooms.  They must focus on the bigger picture than their own silo of practice. The TLs I interviewed talked often about organic conversations in the hallway and about volunteering for tasks even when there is no financial reward for doing so. Andrea stated in her journal entry that "there's more to be done in a school than the administration and the office could do… it takes everybody." They were concerned about their school as a whole and not just their own personal performance.

### Teacher Leadership Has Costs and Benefits

It goes without saying, but must be reiterated just the same, that there are only so many working hours in a day. Teachers are consistently given more obligations and work than they could possibly complete in a school day. The primary job of the teacher is to teach the standard course of study to educate students in their subject area. Thus, teacher leadership activities are in addition to instead of in lieu of that primary work. Each and every TL interviewed discussed how

there was simply not enough time in the day to do all that they needed and wanted to get done. They saw time constraints as one of the only negatives of teacher leadership. In her interview, Maria described the feeling of overwhelm as "feeling like the circus and juggling… something always falls through the gaps, and it is a matter of when instead of if when you take on that many tasks and try to be that hands-on all the time… something will suffer." The TLs interviewed also expressed how much they enjoyed their work as a TL and the benefits of teacher leadership: teacher retention, a feeling of belonging and purpose, and the joy of being helpful.

### The Toll of Teacher Leadership

The toll of teacher leadership is that it applies even more burden on an already near impossible career. TLs often feel like they are depended on for too much instead of finding other people in the building to help shoulder the burden. Andrea said in her interview that she felt like "people are kind of taking advantage of the fact that you won't say no." Jacqueline remarked in her interview that "It really does take a lot… a lot of planning, a lot of time, a lot of devotion." Karina spoke honestly in her interview about how "Adults are exhausting, and I think that there are folks who are not necessarily stepping up. If you are a TL, it's because you care. It becomes disheartening when it feels like others don't care." There is generally no financial incentive for being a TL and none of the TLs interviewed were compensated for their leadership responsibilities in any way, so it is important to look for the positives of teacher leadership. The only financial compensation mentioned by any TL for their service was for their work as a formal mentor, and this compensation was generally considered to be negligible.

### The Case for Teacher Leadership

Having examined the toll of teacher leadership, it's important to recognize that there are positive aspects of teacher leadership. If there were not perks of being a TL, then even more

people would say no to the extra demands, close their classroom doors, and simply teach. TLs reported that their number one motivation for engaging in TL activities is their love for their school and desire to make it a better place for their more conducive to teaching and learning for their colleagues and students. Teachers also find it rewarding to be able to collaborate and assist their peers and their school. In her interview, Andrea said, "I get to collaborate with some very wonderful people…it's because I am helping my colleagues that they can do better to help their students." This collaboration itself metaphorically feeds both the TL and the collaborator.

## Outlier Data and Findings

This section presents the singular outlier data point from the study. In this section, data that fell outside of the norm is discussed. There is only one outlying data point. The experience of all TLs was remarkably similar.

### *Outlier Finding*

One TL interviewed made the comment that "as far as like volunteering for all of the things… I'm not going be that person, but if somebody asks and I feel like I could do it, then I would definitely agree. I'm not going to volunteer to do all the things." While her honesty is to be commended, the response was outside of the normal responses of the other participants. Participants reported going above and beyond and even being taken advantage of at times because of their willingness to volunteer and say yes when opportunities arose. The TL who made this outlier statement, though, was still chosen as a TL by her principal and reported taking on and being trusted with many teacher leadership responsibilities. Her reluctance has not inhibited her ability to be a positive force of teacher leadership in her school. While most TLs described negative aspects of being a TL, this participant was the only TL to admit that she was

reluctant to take initiative and take on extra responsibilities, especially if not individually asked to do so.

<div align="center">

**Research Question Responses**

</div>

This section offers answers to the central research question and the three sub-questions regarding the lived experiences of TLs. Rich narrative is provided to describe TLs experiences as they serve in varied TL roles through spontaneous collaboration, intuitive working relations, and institutionalized, formal leadership structures. Discussion of the themes of active participation as a requirement of teacher leadership, the requisite characteristics of TLs, and the costs and benefits of teacher leadership is then utilized to answer the research question and sub-questions.

**Central Research Question**

What are the lived experiences of teacher leaders as they serve in teacher leadership roles in rural secondary school settings? The lived experiences of teacher leaders widely varied as so much of the teacher leadership experience is based on numerous factors including personal initiative, self-confidence, school administration leadership philosophies and structures along with a host of others determining factors. The interviews all elicited similar responses, though, in terms of the overall experience. TLs often find great personal satisfaction in their work as a teacher leadership even while noting being a TL comes at a great cost in time and rarely with additional financial compensation. They felt like they were trusted employees who had a voice in decisions due to the necessity of being trustworthy and reliable as a requirement for being a TL. All of the TLs interviewed expressed a passion for their job as a teacher even while being well-acquainted with the negatives that come along with being a TL. They expressed that teacher leadership gave their jobs "a dose of novelty" and made it "a new challenge" that "keeps it interesting."

Being driven and coachable was one of the themes that emerged from the data collection process.  Andrea noted in the focus group that "it can definitely be overwhelming when you have a drive to do things well." They felt that their drive and trustworthiness made them almost indispensable as members of their staff. Karina stated in the focus group that "there is a little more job security than the average teacher has." Often these TLs simply fill in a gap that there is no one else to able to fill, and the pressure to do more and be more is often self-inflicted. Abigail expressed in the focus group that she had "the skill that goes here… I have that puzzle piece that fits, and I can make this better or make it great. So, we take on the next new thing. We take on yet another thing." This aptly describes the process by which almost all of the TLs came to be TLs and continued to engage in the work of teacher leadership.

**Sub-Question One**

How do teachers describe teacher leadership experiences of spontaneous collaboration? TLs fill in where there does not seem to be anyone else to fill in. For example, Karina said to the focus group that "if no one else does it, then ultimately who gets failed in that situation is the kids… This has often where I've felt that I've stepped up because the other option (failing kids) was not going to work." Again and again TLs described helping out the new teacher next door who needs help writing lesson plans or managing classroom behaviors. They described offering help to their colleagues, sometimes in the same subject area and sometimes not, who were receptive to "bouncing ideas off of each other." Several even noted how this organic exchange of ideas has morphed into regularly common, collaborative planning.

**Sub-Question Two**

How do teachers describe their teacher leadership experiences of intuitive working relations? TLs described the experience of being the person who their colleagues went to for

answers to questions. They have a willingness to help and a level of expertise that makes them approachable and knowledgeable. Teachers often believed that proximity facilitated these intuitive working relationships that emerge between peers. One teacher said that they found common personal interests with another teacher and then began to collaborate on schoolwork. Another teacher described consistently taking meeting minutes from staff meetings to be able to provide colleagues with the most useful information takeaways. Several teachers described informal PLCs that had emerged as a result of being friends that have led to bringing in newer teachers to collaborate and critique lesson planning ideas.  Rosalyn described in her interview this kind of intuitive working relations as dependent on, "my knowledge of the school, the community, of my subject matter, of being a leader… people know who to go to who will help you and will take charge and handle it if you need them to."

**Sub-Question Three**

How do teachers describe their teacher leadership experiences in institutionalized, formal structures? All but two of the TLs I interviewed are part of their school's school improvement team (SIP), and that one teacher let me know that her administration thinks she is on the team even though she is not in actuality. The other TL noted that she volunteered this school year to step off of the SIP to allow another teacher to participate at that level since she has done it at least ten of her 18 years teaching at this particular school. TLs are called on to engage in the process of school improvement and of being leaders within their departments. Many are department chairs, and all take on a leadership role within their subject-area specific departments. In her interview, Maria described the "different moving parts and components" of the school that she was able to gain insight into by being a part of the institutionalized, formal

leadership structures that she found led to "a lot of growth for me personally… due to increased accountability and responsibility."

## Summary

Teacher leadership is as multifaceted and varied as there are teacher leaders to participate in it. All TLs were active participants who took the initiative in their own classrooms, outside of the walls of their classrooms, and extending to the school level. Teacher leadership does not come without perks or costs.  TLs all found enjoyment in working towards the improvement of their school and the educational experience for students, while acknowledging that there is little in the way of compensation besides this personal satisfaction gained. Teacher leadership is not a suitable fit for every teacher, though. TLs all share the common characteristics of being responsible, trustworthy, collaborative, driven, coachable, and future-driven. The following themes emerged from data analysis of the interviews, focus groups, and journals: teacher leadership requires active participation, there are requisite characteristics of a teacher leader, and teacher leadership has costs and benefits. Based on the lived experiences of the ten TLs interviewed, a significant finding was that the essence of teacher leadership can be summarized this way: an impassioned, accountable service for the purpose of school improvement.

# CHAPTER FIVE: CONCLUSION

## Overview

The purpose of this transcendental phenomenological study is to understand the lived experiences of teachers in leadership roles in a rural, secondary school setting. This chapter will present interpretation of findings from the study and will include interpretation of findings, implications for policy and practice, theoretical and methodological implications, limitations and delimitations, and recommendations for future research. This section includes a description of the "essence" of teacher leadership as identified throughout the study.

## Discussion

Emerging from the common themes (active participation, the requisite characteristics of a teacher leader, and the costs and benefits of teacher leadership) presented in chapter four, a textural description (what) and structural description (how) is presented from phenomenological research study. Empirical and theoretical sources will be used to support the findings of the research. Thorough discussion of interpretations, implications, limitations and delimitations, as well as recommendations for future research are presented.

### Critical Discussion

This study found that teachers share a similar yet varied experience of teacher leadership. Through semi-structured interviews, focus groups, and participant journaling the themes of the active participation required in teacher leadership, the requisite characteristics of teacher leadership, and the costs and benefits of teacher leadership emerged as common themes of all TLs experiences. These themes reflect the shared experience of the participants interviewed describing their lived experiences of participating in teacher leadership.

*Summary of Thematic Findings*

Data collection yielded rich and illuminating data on how teachers experience teacher leadership. The following themes emerged through the analysis of the data through a process of transcription, coding, and clustering: teacher leadership requires active participation, requisite characteristics of a teacher leader, and teacher leadership has costs and benefits. These themes were developed through criterion sampling and triangulated through varied data collection methods. Each of the ten TLs actively participated in teacher leadership activities in their school on varying levels of formality. TLs describe the passion they feel for their work inside and outside of the classroom, and they also describe the negative aspects of their TL work. The TL experience is generally motivated altruistically and intrinsically as there is rarely compensation of any sort financial of otherwise for their efforts. The motivation seems to be mostly from their desire and drive to see all students succeed in their educational pursuits.

**Teacher Leadership Requires Active Participation.** The TLs in the study all echoed the sentiments that there were little benefits to being a TL financially or otherwise besides being "in the know" and the moderate level of prestige that came with sitting on a committee or mentoring a colleague. This echoes Cosenza (2018) in his belief that the TL was less about power and more about extending influence outside of the classroom. The TL engages in behaviors in the following areas according to Sterrett (2014): school culture leadership, collaborative learning leadership, and school management leadership. The data analysis in this research study supports this and takes it a step further by asserting that the motivation behind these endeavors is generally a selfless service to the end of improving student outcomes. Several TLs made some version of the comment that if they did not step up to do it (whatever it was)

then who would do it? They found it unconscionable that the students should suffer for the lack of activity or commitment on their part.

Participants discussed working with teachers who were struggling with difficult students, working on committees for the purpose of school improvement, and a wealth of other experiences as TLs. Their work, though, was rarely for their own personal edification or gain. They cited many other reasons for their commitment to TL including being given a voice in the school, watching other teachers improve their practice, the excitement of new challenges, etc.. These teachers feel a calling to selfless service through teacher leadership activities for the purpose of improving their school.

This is not to say that there are no benefits to the TL for engaging in teacher leadership activities. Quite the opposite, TLs describe feeling great personal satisfaction as a result of their TL work. They report feeling increased job satisfaction, staying in the teaching profession longer, and general positive emotions around being helpful in service to students and their colleagues. This finding supports Oppi et al. (2020) in their assertion that the TL benefits most from their work even though that benefit is not easily calculated or quantifiable.

**Requisite Characteristics of a Teacher Leader.** Teacher leadership is a collaborative practice with the intention of improvement for the student, colleague, or school. TLs have the capacity to singularly get tasks done efficiently and quickly, but the TL is more focused on improving those around him or her, so collaboration is key. TLs engage in informal collaboration with teachers who need help with a particularly difficult student, in formal collaboration with team members on school improvement committees, and in every shade of collaboration in between. When teachers described their experiences as TLs, they always included other people working together collaboratively.  Teacher leadership is never a singular or isolated experience.

This understanding supports the notion of Muijs et al. (2013) that teacher leadership involves crossing the boundaries of classroom, subject, team, and organization. This boundary crossing is another way of describing the collaboration that takes place for the purpose of improving student outcomes.

One of the criteria for being considered a TL in this study was at least three years of teaching experience. This is integral for ensuring that the collaboration that takes place between TLs and the people they work with is based in knowledge and experience. Abigail described her wealth of experience and the experience of one of the teachers she works with across the hallway, who was also considered to be a TL by her principal though chose not to participate in the study, in this way: "we just become this symbiotic unit that fills in where there's a need or lack." While this is certainly an ideal situation Abigail recounts, each of the descriptions of TLs elucidate a space where the TL is able to collaborate and offer help to those who need it based on experience and background knowledge while being renewed personally from the collaborative act itself.

**Teacher Leadership Has Costs and Benefits.**  The TLs I interviewed all held great import and influence in their buildings. Each one of them at some point described their principals coming to them for help on a committee or with an issue.  This power, however informal or formal it may be, requires that there be a level of oversight on the part of the school administration. The responsibilities given to the TLs is dangerous if not monitored and kept in check. For example, a negative attitude among a TL can have great negative impact on a new teacher or on a PLC. The school administration must be accountable to oversee the direction of the work of the TL. In data collection, participants described various levels of principal oversight of their work. While this could be in part because of the required time necessary for monitoring

the expectations put upon TLs, it is necessary, nonetheless.  Szeto and Cheng (2018) describe the trust that must be maintained between the TL and the school administration in order to empower TLs effectively to be agents of change in their workplaces. This trust is developed and maintained over time through TLs doing what they are asked to do and doing it well. Nathan described his relationship with his principal in this way: "I have his trust, so he counts on me to show up every day" to do what is asked and expected.

## Implications for Policy or Practice

Based on the research collected, analyzed, and presented in this paper, there are several important implications for policy and practice. Discussed below are the implications for policy and practice elicited from the findings of this study.

### *Implication for Policy*

Many states have developed standards for teachers as leaders.  For example, North Carolina's Standard 1 of their Professional Teaching Standards requires that teachers demonstrate leadership in their classrooms, in their school, in the teaching profession, that they advocate for their school, and that they uphold high ethical standards (NCDPI, 2015).  This policy, already in place, highlights that teacher leadership is no longer considered optional for NC teachers. They are evaluated throughout the year on their ability to meet these standards. Considering all of the requisite characteristics of TLs and the high cost of teacher leadership highlighted in this study as well as in other related research (Berry, 2019; Nguyen et al., 2019; York-Barr & Duke, 2004), there is a definite need for more capacity building in teachers to be able to accomplish all of the requirements of these standards.

This study interviewed the elite few TLs who met the criteria to be considered a TL according to their principals. Evaluation of leadership standards, though, are held for all teachers

(NCDPI, 2015). This requires increased focus and funding on building capacity of TLs by the state and school districts as advised by York-Barr and Duke (2004), Sinha and Hanuscin (2017), and Wieczorik (2018). If this is the expectation, then it must also be a priority when developing teachers new and experienced. Thirty-five states have teacher leadership policies, but only 21 of those states also give financial incentive for such as extra pay or reduced course load (Will, 2019).

### *Implications for Practice*

School administrators have an already onerous job that can be all-consuming and all-encompassing (Klocko & Wells, 2015; Oplatka, 2017; Upadyaya et al., 2021), so it is difficult to recommend something else to add to their already full plates.  Building capacity for teacher leadership, though, is an easy recommendation for this researcher as it yields far-reaching benefits that will ultimately distribute leadership and may also be able to lessen the workload of the principal (Canterino et al., 2020; Galdames-Calderon, 2023; Meirink et al., 2023). Taking the time to invest in building capacity for teacher leadership in staff yields TLs who help shoulder the heavy workload of the school administrator, albeit with training and oversight. It is like a snowball effect; the principal develops several TLs who in turn develop several more TLs, and soon there are more people in the building who are able to help with the arduous task of educating students.

Another implication for practice is that there needs to be a diversification and snowballing (as previously described) of those tapped and trained as TLs. The TLs interviewed reported that they felt like their willingness to serve allowed them to be taken advantage of by school leadership. Too often the school administrators go to the people who will say yes and who can accomplish a task instead of searching for someone else who may be willing or developing

capacity in those who are willing but ill-equipped. An implication of this study is that school administrators need to be willing and able to develop capacity in more of their staff to distribute leadership more equally. Oppi et al. (2020) suggest that participation in teacher leadership activities may lead to increased commitment to their school. Increased commitment to the school is positive and worthy to be pursued for any educator.

## Theoretical and Empirical Implications

This transcendental phenomenological research study confirms most of the previous research on the topic of teacher leadership. This study was based on the theoretical framework of distributed leadership established by Gronn (2002a). The findings of this research study served to expand this theoretical understanding by providing insight into the lived experiences of rural high school teachers in NC.

### *Empirical Implications*

The findings of this study confirmed many of the findings of previous research around positives and inhibiting factors for teacher leadership. Oppi et al. (2020) found that participating as a TL in distributed leadership increases work satisfaction and self-esteem. This is consistent with the findings of this study. All TLs described the positive feelings associated with being a TL in their school.  This study also confirmed the findings of Weisse and Zentner (2014) in their assertion that the TL themselves are most impacted by their participation in TL activities. This is certainly true for the participants in this study. The average career length of the teachers in this study was 14 years long. This included teachers who had taught a minimum of three years and 26 years at the most. Longevity of career is a positive by-product of teacher leadership, and this study confirms this finding.

This study filled the gap in the existing literature on this topic by focusing on a group of educators who previously had not been studied: rural NC high school teachers. This niche group may well be representative of other rural, lower socioeconomic areas of the United States where teacher leadership might be employed and harnessed as a means of school improvement.

### *Theoretical Implications*

York and Barr (2004) found that at times there arose difficulties between teaching professionals because of the teacher leadership power given to one teacher over another.  There did not seem to be any indication that this was the case for those participants in this study. While TLs could describe the negative aspects of being a TL, a negative effect on collegial relationships was not described by any participant in this study.

Gronn's (2002a) theoretical framework of distributive leadership was confirmed in many aspects of this study. Distributed leadership, as Gronn (2002a) would describe the interactions and daily activities as performed by people throughout the organization though led by a formal leader. This is confirmed in my research findings as teachers are able to take on the tasks and activities of leadership inside and outside of their classroom while also being led by their principal in their efforts. Joint, collaborative effort toward a shared goal was echoed throughout the interviews, focus groups, and journaling in this study.

### Limitations and Delimitations

Limitations are potential weaknesses of the study that cannot be controlled. The limitations of this research study include small sample size, poor response from participants, and a narrow target population. The sample size of ten participants, four from Northern High School and three from Central High School and Southern High School, is within the recommendations of scholarly qualitative research which is between three and ten (Creswell & Creswell, 2018). It

is also within the requirements of ten and 15 participants as required by the Liberty University School of Education. This study also achieved saturation as no new evidence was provided with continued interviews, but had there been more participants, there may have been new information revealed. This limitation poses a challenge to being able to generalize to all high school teachers in the United States or even to all rural NC high school teachers.

The second limitation was the researcher's ability to get participants to commit needed time to the study. While all ten participated in interviews, there were two who were unable to participate in a focus group and one who was unable to submit a teacher leadership journal. This is not surprising considering all of the additional duties asked of TLs in the course of their work. There were participants who were recommended to the study who refused to participate and others who were unwilling or unable to commit to all aspects of the research.

Finally, the target population is a limitation of this study. Only TLs with three or more years of experience who were identified as TLs based on specific criteria given to principals were recommended and then solicited to participate in this study. There are likely TLs at each of the schools who were not asked to participate for whatever reason. This limitation may prevent the generalizability and transferability of findings to settings in any way different from the one studied.

Delimitations are purposeful decisions the researcher makes to limit or define the boundaries of the study. In this case participants must meet the following criteria for participation:

1. Have been licensed teachers for at least three years (or are in their third year of teaching)

2. Are engaging in any of the following activities:

    a. Domain I: Fostering a collaborative culture to support educator development and student learning

b.  Domain II: Accessing and using research to improve practice and student learning

c.  Domain III: Promoting professional learning for continuous improvement

d.  Domain IV: Facilitating improvements in instruction and student learning

e.  Domain V: Promoting the use of assessments and data for school and district improvement

f.  Domain VI: Improving outreach and collaboration with families and community

g.  Domain VII:  Advocating for student learning and the profession

**Recommendations for Future Research**

In consideration of the study findings, limitations, and the delimitations placed on the study, the researcher provides the following recommendations for future research. Future study should include participants groups of varied demographics from the one in this study. Additional phenomenological studies on the experiences of TLs in urban high school settings, urban and rural elementary school settings, and urban and rural middle school settings would provide a more comprehensive understanding of this experience from a perspective unique from those in this study. I also recommend a phenomenological study of the experiences of elementary school teacher leaders to see if the findings are similar. These different types of studies would increase generalizability of the findings on teacher leadership. This researcher is particularly interested in whether the lived experiences of elementary teachers in the same school district studied would yield similar findings. Based on another limitation of this study, the researcher also recommends further research in with greater numbers of participants to increase generalizability of findings.

**Conclusion**

The essence of teacher leadership can be summarized this way: an impassioned, accountable service for the purpose of school improvement. Teacher leadership holds unlimited promise in harnessing the power of teachers for the purpose of school improvement. There are innumerable aspects of teaching and education in general that could be improved with the combined might of TLs. This strength and force require leaders who are secure in their own leadership power and who are willing to distribute leadership to others with oversight and careful monitoring. The education of children is at stake when we split the focus of teachers, and it need not be undertaken without consideration and careful forethought. If the leadership structure of the school is to be in some way flattened and leadership responsibilities are distributed through the organization, more people are able to step in and do the mighty job that needs to be done.

There is more than enough work to go around to improve the educational outcomes of all students. Leaders need to be careful not to simply delegate away the unwanted tasks that they do not want to do themselves. Rather, leaders should increase the capacity of their teachers to be able to lead inside and outside of their classroom walls. When teachers can help their colleagues solve problems without needing to always go to the principal, the principal is freed to do the weightier work of school improvement and educational outcomes are improved for every child.

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**APPENDIX A: INSTITUTIONAL REVIEW BOARD APPROVAL**

# LIBERTY UNIVERSITY.
## INSTITUTIONAL REVIEW BOARD

March 28, 2023

Re: IRB Exemption - IRB-FY22-23-703 A Phenomenological Study of the Teacher

Leader Experience

Dear Leslie Magnanti, Gregory Mihalik,

The Liberty University Institutional Review Board (IRB) has reviewed your application in accordance with the Office for Human Research Protections (OHRP) and Food and Drug Administration (FDA) regulations and finds your study to be exempt from further IRB review. This means you may begin your research with the data safeguarding methods mentioned in your approved application, and no further IRB oversight is required.

Your study falls under the following exemption category, which identifies specific situations in which human participants research is exempt from the policy set forth in 45 CFR 46:104(d):

Category 2.(iii). Research that only includes interactions involving educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior (including visual or auditory recording) if at least one of the following criteria is met:
The information obtained is recorded by the investigator in such a manner that the identity of the human subjects can readily be ascertained, directly or through identifiers linked to the subjects, and an IRB conducts a limited IRB review to make the determination required by §46.111(a)(7).

Your stamped consent form(s) and final versions of your study documents can be found under the Attachments tab within the Submission Details section of your study on Cayuse IRB. Your stamped consent form(s) should be copied and used to gain the consent of your research participants. If you plan to provide your consent information electronically, the contents of the attached consent document(s) should be made available without alteration.

Please note that this exemption only applies to your current research application, and any modifications to your protocol must be reported to the Liberty University IRB for verification of continued exemption status. You may report these changes by completing a modification submission through your Cayuse IRB account.

If you have any questions about this exemption or need assistance in determining whether possible modifications to your protocol would change your exemption status, please email us at irb@liberty.edu.

Sincerely,

G. Michele Baker, MA, CIP

Administrative Chair of Institutional Research

Research Ethics Office

## APPENDIX B: INFORMED CONSENT FORM

**Informed Consent Form**

**Title of the Project:** A Phenomenological Study of the Teacher Leader Experience

**Principal Investigator:** Leslie Magnanti, Liberty University Doctoral Student

| Invitation to be Part of a Research Study |
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You are invited to participate in a research study. In order to participate, you must be at least 18 years of age, a licensed teacher in North Carolina who has taught for 3 years and be identified as a teacher leader in the school by the principal or their peers. Participants must also be employed at JF Webb High School, Granville Central High School, or South Granville High School. Participants must also engage in any of the following activities:

    a. Domain I: Fostering a collaborative culture to support educator development and student learning
    b. Domain II: Accessing and using research to improve practice and student learning
    c. Domain III: Promoting professional learning for continuous improvement
    d. Domain IV: Facilitating improvements in instruction and student learning
    e. Domain V: Promoting the use of assessments and data for school and district improvement
    f. Domain VI: Improving outreach and collaboration with families and community
    g. Domain VII: Advocating for student learning and the profession

Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research project.

| What is the study about and why is it being done? |
|---|

The purpose of this phenomenological study is to understand the experiences of teacher leaders as they serve teacher leadership roles in a rural, secondary school setting. The phenomenological approach will be used for this study. This approach is a valid design for my study because it will allow me to be able to study the phenomenon of teacher leadership and to collect data from individuals who have participated in teacher leadership. It will be important to choose participants carefully and to be able to suspend my own personal beliefs about the importance of teacher leadership to be able to generate new themes from data analyzed.

| What will happen if you take part in this study? |
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If you agree to be in this study, I will ask you to do the following things:

1. Participate in one interview with the researcher. This should take no more than 30 to 45 minutes to complete. This interview will be audio and video recorded through Google Meet for transcription.

2. Keep a journal of teacher leader tasks assigned and completed. This should take no more than 30 minutes to complete cumulatively.
3. Participate in a Focus group that will take approximately 45 minutes to complete.

### How could you or others benefit from this study?

Participants should not expect to receive a direct benefit from taking part in this study.

Benefits to society include helping to provide a better understanding of how teacher leadership may benefit the educational system by lessening the burden of the school administrator and increasing teacher retention and administration retention.

### What risks might you experience from being in this study?

The risks involved in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

### How will personal information be protected?

The records of this study will be kept private. Research records will be stored securely, and only the researcher will have access to the records. Data collected from you may be shared for use in future research studies or with other researchers. If data collected from you is shared, any information that could identify you, if applicable, will be removed before the data is shared.

- Participant responses will be confidential. Participant responses will be kept confidential through the use of pseudonyms. Interviews will be conducted in a location where others will not easily overhear the conversation.
- Data will be stored on a password-locked computer and may be used in future presentations. After five years, all electronic records will be deleted.
- Interviews will be recorded and transcribed. Recordings will be stored on a password-locked computer for three years and then erased. Only the researcher will have access to these recordings.
- Confidentiality cannot be guaranteed in focus group settings. While discouraged, other members of the focus group may share what was discussed with persons outside of the group.

### Is study participation voluntary?

Participation in this study is voluntary. Your decision whether to participate will not affect your current or future relations with Liberty University. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

### What should you do if you decide to withdraw from the study?

If you choose to withdraw from the study, please contact the researcher at the phone number included in the next paragraph. Should you choose to withdraw, data collected from you will be destroyed immediately and will not be included in this study.

### Whom do you contact if you have questions or concerns about the study?

The researcher conducting this study is Leslie Magnanti. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact her at ▮▮▮▮▮▮▮▮ You may also contact the researcher's faculty sponsor, Dr. Gregory Mihalik, at ▮▮▮▮▮▮▮▮

**Whom do you contact if you have questions about your rights as a research participant?**

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd., Green Hall Ste. 2845, Lynchburg, VA 24515 or email at irb@liberty.edu

*Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.*

**Your Consent**

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

☐ The researcher has my permission to audio-record me as part of my participation in this study.

_____
Printed Subject Name

_____
Signature & Date

## APPENDIX C: SEMI-STRUCTURED INTERVIEW

Semi-Structured Interview Questions

1. Please describe your educational background and career through your current position. CRQ

2. In what ways do you see yourself acting as a teacher leader? CRQ

3. What are some of the activities in your position related to teacher leadership? CRQ

4. What are the positive aspects of teacher leadership, the things that keep you motivated to continue leading? CRQ

5. What are the negative aspects of teacher leadership, the things that make you want to give it up? CRQ

6. How would you describe your experience of leadership in spontaneous collaboration while serving as a teacher leader? SQ1

7. How would you describe your experience of developing intuitive working relations while serving in the teacher leader role? SQ2

8. How would you describe your experience in formal institutional leadership structures? SQ3

9. We have covered a lot in our interview, and I sincerely appreciate the time you've spent with me. What else do you think is important for me to know about teacher leadership? CRQ

10. Describe your school administration and their leadership style.

## APPENDIX D: FOCUS GROUP QUESTIONS

Based on Patton's (2015) use of focus groups, final iteration of focus group questions will not be derived until after the initial data analysis from the interviewing process. Possible focus group questions include:

9.  Please state your name and tell me your favorite thing about being a teacher leader.  CRQ

10. What are the positive aspects and perks of being a teacher leader? CRQ

11. What are some of the negative aspects of being a teacher leader? CRQ

12. Why do you continue to be a teacher leader despite these negative aspects? CRQ

13. Describe a time when you engaged in spontaneous collaboration as a teacher leader. SQ1

14. Describe how you engage with your colleagues as a teacher leader on a normal, unguided basis? SQ2

15. Describe your experience with formal, institutionalized teacher leadership opportunities. SQ3

16. Based on your interview, as you have experienced teacher leadership, what do you think you add to your school's leadership as a whole? CRQ

## APPENDIX E: JOURNAL PROMPTS

Instructions: Over the next two weeks, please take the time to jot down your answers to the following questions. Please send to me via email on ENTER DATE HERE. I will send an email reminder one week and one day before this date.

1. Please take some time over the next two weeks to keep a list of the things that you do that you would classify as teacher leadership tasks.

2. When you are completing your teacher leadership activities, what are some of the emotions that you feel about teacher lead

## APPENDIX F: LETTER TO SCHOOL LEADERSHIP

12/13/22

Northern High School, Central High School, Southern High School
School's Address

Dear Principal of Northern High School, Central High School, or Southern High School,

As a graduate student in the School of Education at Liberty University, I am conducting research as part of the requirements for a doctoral degree. The title of my research project is *A Phenomenological Study of the Teacher Leader Experience*, and the purpose of my research is to better understand the experience of teacher leaders to be able to harness the potent tool of teacher leadership for better student outcomes as well as increased job satisfaction for both administrators and the teachers themselves.

I am writing to request your permission to conduct my research at Northern High School. Participants will be asked to schedule an interview, keep a journal of their teacher leadership activities, and participate in a focus group. Participants will be presented with informed consent information prior to participating. Taking part in this study is completely voluntary, and participants are welcome to discontinue participation at any time. I am asking that you provide the names of those teacher leaders with a letter inviting them to participate in my research study. I will then contact those teachers to see if they are able and willing to participate and to set up initial interviews.

Thank you for considering my request. If you choose to grant permission, please provide a signed statement on official letterhead indicating your approval. Please send this letter to my email (magnantily@gcs.k12.nc.us). A permission letter document is attached for your convenience.

If permission is granted, please provide me with 4-5 names of teachers you believe meet the following criteria:
1. Have been licensed teachers for at least three years (or are in their third year of teaching)
2. Are engaging in any of the following activities:
   a. Domain I: Fostering a collaborative culture to support educator development and student learning
   b. Domain II: Accessing and using research to improve practice and student learning
   c. Domain III: Promoting professional learning for continuous improvement
   d. Domain IV: Facilitating improvements in instruction and student learning
   e. Domain V: Promoting the use of assessments and data for school and district improvement
   f. Domain VI: Improving outreach and collaboration with families and community
   g. Domain VII: Advocating for student learning and the profession

**APPENDIX G: EPOCHE**

To be able to research teacher leadership objectively and with fidelity, it is necessary to engage in the practice of Epoche, or the bracketing off of my own personal experiences, suppositions, and biases. As a qualitative researcher, I chose a topic that I have personal interest in and have experiences with myself. My relationship to the topic as well as my relationship with the school district in which I am doing my research will be clearly explained hereafter.

I taught high school English for eighteen years. At year seven, I had the itch to move on to school administration, but I knew that to do so would pull me away from my own children quite a bit more than the classroom required. Almost all of my principals practiced distributed leadership and allowed me to participate in the decision-making of the school and to contribute to the school outside of my own classroom walls. I taught in a small school that did not have an assistant principal for 15 of my 18 years of teaching, and this forced my principals to reach out for help. I also gained experience as a teacher leader by doing my internship for my master's degree program concurrently with teaching. It was my personal practice to say yes to opportunities to lead in my school even though there was no compensation outside of my own personal fulfillment in doing so. As a teacher leader, I was a mentor, taught professional development sessions on various topics, served on numerous committees and advisory panels, worked on curriculum design teams at the district level, and engaged numerous other miscellaneous teacher leadership practices. I personally attribute the length of my career to the fulfillment I obtained through being a teacher leader.

It is also pertinent to note that I worked in the school district and at one of the schools that serve as the location of my study for part of the time I was working on my research. I moved into school administration as an assistant principal before beginning my research and, thus, was

not at that high school when I conducted my research. I had worked with all of the teacher leaders who were chosen at my high school. This distance helps me to be able to see objectively my role as a teacher leader and to be able to listen to the shared experiences of the TLs interviewed to be able to seek a fresh and unbiased understanding of the essence of teacher leadership.

Based on my experiences as a teacher leader and working in the district and at one of the high schools being studied in my research, I needed to bracket off my biases and suppositions as I collected and studied my data:

- Teacher leadership is a fulfilling way to retain teachers in the classroom.

- Opportunities for teacher leadership should be extended to all teachers who are interested and able.

- Teacher leadership is worth the effort that is required.

- There is often no compensation, financial or otherwise, for teacher leadership work.

The presuppositions that I bring to this research must be laid aside to ensure that I clearly hear and understand the whole truth of those teacher leaders who I interviewed. I am limited by my own experience of working in only one high school before moving into an administrative position. It is my goal through this Epoche to remain objective and to seek to understand the lived experiences of my participants without my own personal experiences clouding my judgment and thinking.

# APPENDIX H: SAMPLES OF DATA ANALYSIS PROCESSES

## ATLAS.ti Web (top screenshot)

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Research Interview (████████ 23-04-18 15_57 GMT-4) - Trans...   Search   Tools

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████████ So, informally I came on to Granville County with a few. Any teachers who were in? First. Single one of. My teacher neighbor her and I have partnered off a lot with just lesson planning and Unofficially kind of helping her. Get on her feet mentoring, her helping her with curriculum design. Lesson planning, parent, contacts, parent communication.

████████ We've done some of that work with her and a couple of the other beginning teachers that I came on with last. Year. Um, like you said, inside our department, we already have a department chair so that position currently isn't available for me. I am on the school improvement. Team this year at Granville County so that's a little that's a little more formal in terms of teacher leadership and...

Leslie Magnanti: ultimately,

████████: just trying to

████████ And make sure that I am psarticipating in those opportunities as far as school improvement plan goal, setting and development. I've been working closely with the guidance counselor on a PLC with her trying to also Some of these objectives and do some of these things as far as empowering other teachers, do some of that kind of unofficial work, like you said, mentoring other teachers and just even facilitating. And

Mentoring 29
Collaboration 44
Planning 16

Leadership 65
Professional Develop... 31

Mentoring 29
Leadership 65
Professional Develop... 31
Empowerment 5

## ATLAS.ti Web (bottom screenshot)

Document Manager
Code Manager
Quotation Manager
Memo Manager
Views
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Project Settings
Help & Support
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LM  Leslie Magnanti

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good decisions. It feels good to have your decisions supported!

5/1

Wrote an email on behalf of a mentee who noticed many of her students seemed high. Mentee was unsure of how to handle it, and since our AP of discipline was out today, I suggested we write an email.

Leadership meeting canceled and rescheduled. This allowed me and ████ to be able to meet this afternoon instead (he needs help planning trig unit). Although I sent him an email of this update, I don't know if he saw it. He asked this morning to meet after school today.

We met, and I helped him plan the next unit.

Everyday:

Planning with ████████ s her mentor and the math chairperson, I have a responsibility to follow through on shared goals. It always takes time and energy that is pulled from another task. However, I do feel good about collaborating because I think it improves teaching and learning. I rarely have time to myself, however, and that gets frustrating. I am ALWAYS talking/listening to someone. It does get exhausting.

Problem-solving 6
Positive Feedback 8

Communication 12
Planning 16

Collaboration 44
Responsibility 34