INSIDERS' VOICES: A PHENOMENOLOGICAL STUDY OF INFORMAL TEACHER LEADERSHIP FROM THE PERSPECTIVE OF THOSE WHO CHOOSE TO LEAD

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This qualitative study examined the phenomenon of informal teacher leadership from the perspective of teachers who willingly, and for no compensation, choose to accept responsibilities beyond those specified by the terms of their contractual agreements. The study was conducted to discover factors – namely, elements of school culture – that motivate informal teacher leaders to accept responsibilities beyond those required. By learning why some teachers choose to lead by engaging in extra-role behaviors (Organ, 1990) while others do not, I am able to propose ways that school administrators might encourage informal teacher leadership necessary for school improvement.

Research was situated in one small and one medium sized suburban middle school in Pennsylvania. During semi-structured interviews with principals, informal teacher leaders, and non-leading teachers, respondents described the phenomenon of informal teacher leadership according to his or her: (a) perception of self; (b) understanding of role; (c) prior experiences; (d) administrator's actions; (e) community's needs; and (f) school's culture.

As a result of this study, I discovered that "informal teacher leadership" cannot be defined universally because the term means something unique and personal to every leader. Although informal teacher leaders often remain self-motivated to assume extra-role responsibilities (Organ, 1990), administrators' actions, school culture, relationships among

colleagues, and the perceived physical or emotional needs of students also influence whether some teachers will extend themselves beyond the terms of their contracts.

To promote and sustain this abstract phenomenon, administrators might help teachers recognize their respective and often undefined roles – perhaps according to four domains of organizational citizenship behaviors (Oplatka, 2006). Administrators also might encourage the phenomenon by fostering a culture conducive to the emergence of informal teacher leaders. According to respondents, administrators can create this type of culture by: (a) cultivating, supporting, and praising informal leadership behaviors; (b) squelching behaviors that hinder informal teacher leadership, and particularly, incidences of relational bullying among colleagues – a significant impediment to informal teacher leadership; and (c) familiarizing teachers with the needs of the surrounding community.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

ACKNOWLEDGEMENTS

For my uncle, Anthony Cavallucci II

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1.0   INTRODUCTION

Complex and powerful relationships exist among school administrators who envision change, teacher leaders who enact change, and teachers who either accept or reject change. In the current era of school reform, both school administrators and teacher leaders who implement change need to examine the intricacies of such associations if they wish to improve their school districts. By understanding the web-like, multifarious relationships present in schools, educators might begin to generate plans for quality improvement initiatives based upon collaboration and shared decision-making.

Of all stakeholders involved in reform processes, teacher leaders represent a unique group of educators who maintain an "in between" position. They collaborate frequently with administrators while practicing alongside their colleagues. The intermediary nature of teacher leaders' roles raises some issues for teacher leaders themselves and for those who wish to initiate and sustain school reform.

The issues require educators to analyze their schools and reflect upon themselves both professionally and personally. Administrators and teacher leaders might

evaluate their schools' cultures to determine ways either to promote or preserve a sense of collegiality necessary for change to occur. Also, teacher leaders might consider how to establish and maintain mutually respectful relationships with administrators who either can advance or hinder their progress. Finally, teacher leaders might learn to develop a strong identity essential for furthering their school districts' improvement agendas despite potential barriers like toxic school cultures or uncooperative colleagues.

During this time of school reform, teacher leaders can investigate reliable, empirical research to inform their work and assist them in developing strong professional identities. Particularly, informal teacher leaders – those who choose to extend themselves beyond the terms of their contractual agreements without compensation – can explore the subject of teacher leadership to recognize their motivation despite numerous barriers, and gain support for their work. Administrators might examine this same research to discover ways to promote and sustain teacher leadership proven imperative for quality school improvement.

The intent of this qualitative study was to explore the subject of informal teacher leadership through the perspectives of teachers who choose to lead, their principals, and their colleagues. By understanding how school principals identify informal teacher leaders, how informal teacher leaders distinguish themselves and their roles, and how principals and teachers who do not act as informal leaders perceive informal teacher leaders and their roles, I am able to suggest to educators ways to encourage more teachers to lead the types of reform necessary for quality school improvement. Additionally, by reading this research, teachers with the desire to lead might better understand their own motivation to extend themselves beyond their classrooms in order to enact change and improve student achievement.

1

This chapter serves as a guide to this in-depth study of informal teacher leadership that addresses the issues presented above. The following sections of Chapter 1 outline: (a) the statement of the research problem, including the disciplinary bases for this study and operational definitions of terminology used; (b) the purposes of this study; (c) research questions explored; and (d) strengths and limitations of the study. Within each section are subsections that further expound the need for and significance of this study.

1.1   STATEMENT OF THE RESEARCH PROBLEM

Teacher leadership, in general, is an abstract concept that is difficult to articulate (Lambert, 2003). The subject of informal teacher leadership is even more intangible because it appears to be situational, and teachers become informal leaders in various ways. This study examined how teachers identified as informal leaders perceive their respective roles and paths to leadership.

Investigating this topic at the formal level is critical for two reasons. First, little is written from teacher leaders' perspectives (Birky, Shelton, & Headley, 2006). This study attempted to elucidate informal teacher leadership through the personal experiences and perspectives of informal teacher leaders. Next, teacher leadership is imperative for school improvement (Danielson, 2007; Mayo, 2002). By understanding how informal teacher leaders distinguish themselves and their roles, school administrators may be able to encourage more teachers to lead and therefore improve their organizations.

1.1.1 Disciplinary Bases for This Study

The field of education serves as the primary disciplinary base for this study of informal teacher leadership. The subject of leadership itself spans a variety of disciplines, but "teacher leadership" applies specifically to education.

Nevertheless, the concept of teacher leadership is grounded heavily in the social sciences and particularly sociology. *The Blackwell Dictionary of Sociology* (Johnson, 2008), for example, defines leadership as "the ability to influence what goes on in a social system…Sociologists are particularly interested in the circumstances under which leadership emerges in groups" (p. 43). Researchers who have studied teacher leadership in education settings have identified circumstances that promote the growth of teacher leaders (Acker-Hocevar & Touchton, 1999; Hargreaves, 1994; Kardos, Moore Johnson, Peske, Kauffman, & Liu, 2001) – a specific group of educators who are able to influence the functioning of schools (Danielson, 2007).

Table 1 outlines additional definitions of leadership from social science disciplines that have influenced the definition of informal teacher leadership used for the purposes of this study (presented in Section 1.1.2). This information provided the foundation for much of the literature discussed in Chapter 2, as well as the issues identified in the next section of this chapter.

Table 1 Definitions of Leadership as Applicable to This Study

Topic	Researcher(s) and Date	Definition of Leadership as Applicable to This Study
Transformational Leadership	Bass (1995), in Pounder (2006)	Leaders stimulate followers to trust them and rethink their practice by coaching, mentoring, and modeling, and by communicating their visions
Role Theory	Hart (1994); Podsakoff et al. (2000)	Leaders' perceptions of their roles impact their degrees of organizational citizenship behaviors; people who fill set roles within a system exhibit particular characteristics; established social patterns are resilient and social pressure is increased during times of change; and an organization's social system is shared
Symbolic Interaction Theory	Hart (1995)	A shared understanding develops among people when they communicate and interact; as trust increases and communications decrease, shared values emerge
Social Exchange Theory	Harris (2003)	Leaders provide services to a group in exchange for a group's approval or compliance; by empowering followers, leaders increase their own power
Constructivist Theory	Lambert (2003)	The reciprocal processes that enable participants in an educational community to construct meanings that lead toward a shard purpose of schooling
Moral Leadership	Lieberman & Friedrich (2007)	Leaders feel a strong moral commitment to do what is right

As Table 1 indicates, the subject of teacher leadership is rooted in a number of diverse theories within disciplines ranging from business to sociology. Although numerous researchers from the field of education have attempted to define teacher leadership and have discovered common behaviors among teacher leaders, none have agreed upon a universal definition of the term (Lambert, 2003). This presents a problem for those who wish to study teacher leadership because expressing the complex notion is challenging.

The literature has yielded two clues as to why articulating the subject of teacher leadership is challenging: (a) Teacher leadership appears to be situational, and (b) teachers become leaders in various ways. These issues, as relevant to the overarching problem stated in Section 1.1, are discussed below in Sections 1.1.1.1 and 1.1.1.2.

1.1.1.1 Teacher Leadership as Situational

Teacher leadership manifests dissimilarly in varied contexts; leadership appears to be situational. For example, in schools where administrators remain willing to relinquish some of their responsibilities to teacher leaders, teacher leadership flourishes (Muijs & Harris, 2007). Conversely, in schools where administrators fail to provide formal support structures for teacher leaders, teacher leadership flounders (Johnson & Donaldson, 2007).

Researchers have generalized their findings to report concrete factors that either promote or hinder teacher leadership (See Table 2 below), but they have not settled upon a common definition of the term. Although the literature does not express this directly, researchers may have recognized that teacher leaders' actions cannot, or should not, be reduced to a single definition of teacher leadership. The term, "teacher leadership," might have particular meanings in diverse contexts. Those contexts, in conjunction with the teacher leaders themselves, may contribute to various definitions of teacher leadership.

Specifically, teacher leaders' behaviors and the personal qualities they exhibit seem to depend upon numerous factors or situations that either contribute to or impede their leadership practices. Combinations of these factors or situations might result in distinctive forms of teacher leadership, thus constituting the need for several definitions of the term. Table 2 reviews the primary contributing factors and hindrances to teacher leadership featured in Chapter 2.

Table 2 Factors that Contribute To or Hinder Teacher Leadership

Factors that Contribute to Teacher Leadership	Factors that Hinder Teacher Leadership
Positive, collegial school culture Administrators willing to distribute leadership Professional development Time to lead Defined roles for teacher leaders Clear sense of purpose Ability to communicate with colleagues Willingness to extend beyond the classroom	Negative, adversarial school culture Administrators unwilling to distribute leadership Lack of training Lack of time Undefined roles for teacher leaders Lack of confidence Forcing change upon colleagues Unsupportive colleagues

1.1.1.2 Various Paths to Exercise Teacher Leadership

Another reason why the notion of teacher leadership might be difficult to articulate is because teacher leaders – especially those who serve as informal teacher leaders – develop as leaders in multiple ways. While some choose to assume leadership responsibilities because they are motivated by a particular issue that arises in school (Lashway, 1998), others become leaders by default because their colleagues identify them as pedagogical or content area experts (Danielson, 2007; Martin, 2007).

Whereas some spontaneously emerge as leaders due to their colleagues' recognition of them as experts in the field (Patterson & Patterson, 2004), others maintain a strong sense of purpose (Donaldson, 2007) and strive to influence colleagues to change through the establishment of collegial relationships (Wilson, 1993). Still, some teacher leaders are appointed

by their superiors who recognize that shared, distributed leadership (Elmore, 2000) is necessary for teacher empowerment (Blasé & Blasé, 2000) and the smooth operation of schools (Spillane et al., 2001). Furthermore, other teachers choose to lead because they are provided with leadership training during either their pre-service education or professional development once hired (Katzenmeyer & Moller, 2001). Hence, teachers become leaders in a variety of ways. For some informal teacher leaders especially, their journeys to leadership may be dissimilar from those described in the literature.

Despite these factors that might prevent researchers from defining informal teacher leadership concretely, informal teacher leadership, particularly, needed to be defined for the purposes of this study. Section 1.1.2 offers a definition of informal teacher leadership as studied.

1.1.2   Informal Teacher Leadership as Defined for the Purposes of This Study

For the purposes of this study, informal teacher leadership is defined as leadership demonstrated by teachers who: (a) engage in organizational citizenship behaviors (OCBs) (Oplatka, 2006), or extra-role behavior (Organ, 1988), by willingly volunteering to extend themselves beyond their classrooms or per the terms of their contractual agreements, and (b) do not receive compensation in the form of money or time for extending themselves beyond their classrooms or contracts. Additionally, informal teacher leaders are categorized as those who: (a) build trust and rapport among colleagues without exercising power; (b) maintain a clear sense of purpose; (c) accept and attempt to enact change; (d) model professional growth; and (e) demonstrate self-motivation, enthusiasm, and creativity.

Behaviors informal teacher leaders might exhibit that also can be considered examples of OCBs include, but are not limited to: (a) serving as ad hoc committee members, or organizing

7

extemporized groups of teachers; (b) sponsoring or coaching extracurricular activities; (c) tutoring students either before or after school hours; (d) mentoring new teachers (Harris, 2003); (e) assisting colleagues upon their request; (f) organizing or conducting professional development workshops (Moller et al., 2001); (g) helping administrators make decisions that will affect the school or district; (h) organizing or calculating the annual budget; (i) building collegial relationships and confidence in colleagues; (j) diagnosing organizational needs (Lieberman et al., 1988); and (k) challenging the status quo to encourage change without using power (Donaldson, 2007; Silva et al., 2000).

Finally, informal teacher leaders who participated in this study were identified also according to their personal qualities as determined by their school principals (Chapter 3 discusses how principals identified respondents for this study). As the literature explains, informal teacher leaders are: (a) self-motivated (Wilson, 1993), (b) willing to take risks, (c) intrapersonal, (d) enthusiastic, (e) creative, and (f) lifelong learners (Moller et al., 2001). Specific findings that have influenced this operational definition of informal teacher leadership are summarized below in Table 3.

Table 3 Findings that Influenced the Operational Definition of Informal Teacher Leadership

Researcher(s)	Date	Finding(s)
Organ	1988	OCB is discretionary, not recognized by the formal reward system, and that which promotes the effective functioning of the organization.
Podsakoff et al.	2000	The seven components of OCB include: (a) helping behavior (b) sportsmanship, (c) loyalty, (d) compliance, (e) individual initiative, (f) civic virtue, and (g) self-development.
Oplatka	2006	Teachers' OCB can be directed at individual students, whole classes, colleagues, or the school organization.
Blasé and Blase	2000	Teacher leaders assume duties that extend beyond the classroom.
Lieberman and Miller	2005	Teacher leaders extend themselves beyond their classroom because they are self-confident and self-motivated to "go public with their work."
Muijs and Harris	2007	Informal teacher leaders are not paid for their time, and may teachers do not want to assume additional responsibilities without compensation.
Lieberman et al.	1988	Teacher leaders build trust and rapport among colleagues.
Martin	2007	Teacher leaders relate well to others.
Harris	2002	Developing and maintaining collegial relationships is important to teacher leaders, who model effective forms of instruction.
Wasley	1991	Teachers can serve as powerful leaders if they are able to relate collegially with peers.
Gehrke	2004	Teacher leaders do not use power, but instead, fight for control of their work in the interest of increasing student achievement.
Wilson	1993	Teacher leaders, self-motivated role models, enable others to act.
Donaldson	2007	Teacher leaders exude confidence, but do not use power to influence or assist peers – their primary purpose.
Moller et al.	2001	Teacher leaders focus on student achievement and leading, and seek learning opportunities for themselves in order to initiate change.

Table 3 (Continued)

Researcher(s)	Date	Finding(s)
Silva et al.	2000	Teacher leaders model professional growth.
Pechman and King	1993	Teacher leaders behave respectfully toward colleagues and superiors.
Olson	2005	Teacher leaders influence colleagues and build relationships through respect by discussing student learning.

1.1.2.1 Additional Operational Definitions Used

Aside from the above operational definition of informal teacher leadership and description of informal teacher leaders, the following terms and operational definitions were used for the purposes of this study.

- *Formal teacher leaders* are those teachers who, for compensation (usually in the form of time or money), assume responsibilities beyond those outlined as per the terms of their contractual agreements. Formal teacher leaders are given specific titles, like paid mentor teacher, curriculum specialist, literacy or mathematics coach, department chair, or lead teacher. Most often, formal teacher leaders need to apply for their leadership positions.

- *Organizational citizenship behavior(s)* (introduced in Section 1.1.2) refers to the extra behaviors in which teachers choose, but are not required, to engage.

- *Non-leaders* are those classroom teachers who, throughout their teaching careers, have chosen not to assume either formal or informal leadership responsibilities.

All the aforementioned terms and operational definitions will be used throughout this document. When necessary, more detailed descriptions are provided to ensure an accurate understanding of the research conducted.

1.2   PURPOSES OF THIS STUDY

This qualitative study examined the phenomenon of informal teacher leadership from the perspective of teachers who voluntarily, without compensation, accept responsibilities beyond those specified as per the terms of their contractual agreements. The study was conducted for two purposes. First, by learning why some teachers choose to lead by willingly engaging in extra-role behavior while others do not, I can suggest to administrators ways to encourage informal teacher leadership necessary for school improvement. Next, as a teacher who sometimes fails to recognize her own motivation for assuming informal leadership responsibilities despite numerous barriers, I performed this study in order to come to a stronger understanding of myself. I thought that if I determined what inspires me to lead, then I might discover how to instill in my colleagues a similar desire to work as diligently as possible in an effort to improve student achievement. These two purposes are explained in greater detail below.

1.2.1   Learning Why Some Teachers Choose to Lead

One purpose of this study was to discover how informal teacher leaders perceive their roles within their respective schools. The study also served to examine the complex relationships that exist between informal teacher leaders and their colleagues, and informal teacher leaders and their supervisors. Essentially, findings gleaned from this study were used to offer suggestions to educators – particularly school administrators – regarding how they might encourage and maintain informal teacher leadership necessary for school improvement.

The subject of teacher leadership, in general, still remains "conceptually underdeveloped" (Crowther, 1996, p. 305). However, Elmore (2000) has stressed the importance of shared leadership in schools, and Spillane, Halverson, and Diamond (2001) have charged school administrators with the task of distributing their leadership to teachers if they wish to sustain school improvement initiatives. If school administrators can improve their schools with the assistance of teacher leaders, then they might wish to learn why some teachers desire to lead while others remain reticent when given an opportunity to lead. Discovering why some teachers choose to lead or how they come to accept leadership responsibilities may help administrators build school cultures conducive to the development of informal teacher leaders.

Gehrke (2004) revealed that the best way to learn about teacher leadership is by speaking with teacher leaders and their colleagues. He recommended interviewing "intervention cases" – those educators who have worked with teacher leaders – to gather information regarding colleagues' perceptions of teacher leadership. Similarly, researchers suggested learning about perceptions of teacher leadership by exploring the effect of teacher leadership on the teacher leaders themselves (Sturtevant & Linek, 2007). Learning informal teacher leaders' perceptions of teacher leadership might help researchers and practitioners who want to move their school districts forward better understand the factors that promote and sustain the phenomenon.

1.2.2 Understanding My Own Motivation to Lead

The second purpose of this study was to learn more about myself – professionally and personally – by thoroughly exploring the subject of teacher leadership through the perspectives of fellow informal teacher leaders. By conducting this study, I came to understand better my own motivation to serve as an informal teacher leader despite the numerous barriers I encounter

12

regularly. Now, I might be able to recognize my colleagues' varied motivations for leading or choosing not to lead, reinforce informal leadership behaviors, and therefore, improve our school.

To investigate this topic, I prepared three research questions to help me gain an insiders' perspective on informal teacher leadership. The next section of this chapter introduces the specific research questions that were explored during this study.

1.3   RESEARCH QUESTIONS EXPLORED

The review of literature on the subject of teacher leadership (presented in Chapter 2) and my assumptions about teacher leadership as a result of maintaining an insider's perspective have prompted me to frame research according to issues of interest that need to be investigated more thoroughly. Although much information has been discovered about teacher leadership, the literature identifies areas that require further exploration. Studying these issues from a constructivist research perspective has helped me to come to know myself better while contributing to the larger academic community.

As described in detail in Chapter 3, this study employed qualitative research methodology to gather, interpret, and analyze empirical data. Following Erickson (1986), who explained that conceptions in qualitative research are revealed during the analysis of data, no definitive hypothesis was tested. However, three overarching research questions guided the gathering of data – particularly in the design of interview guides and the analysis of data from a constructivist approach. Also, a number of assumptions were acknowledged as examples of researcher bias. Table 4 summarizes this information, which is discussed more thoroughly in Chapter 3.

Table 4 Areas for Further Investigation, Relevant Research Questions, and Assumptions

Areas for Further Research	Researcher(s) Who Suggested	Resulting Research Question(s)	Researcher's Assumptions
Defining teacher leadership	Crowther, 1996 Lambert, 2003	1. What does the term, "informal teacher leadership," mean in different contexts?	Teacher leadership cannot be defined because it is a situational construct. Informal teacher leaders understand teacher leadership in various ways as determined by their personal experiences.
Understanding informal teacher leadership from the perspective of teacher leaders and those who work with them	Birky et al., (2006) Gehrke, 2004	2. How do informal teacher leaders perceive themselves and their roles? (A) How do school principals perceive teacher leaders and their roles? (B) How do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles?	Informal teacher leaders believe their primary role is to improve student achievement. How they perceive themselves as leaders, and how they think their administrators and colleagues perceive them, determines whether or not they achieve their goal of increasing student achievement. For informal teacher leaders the task of improving student achievement becomes secondary to circumventing barriers and dealing with the micro-politics of schools if administrators and colleagues are not supportive of their willingness to assume leadership responsibilities.

Table 4 (Continued)

Areas for Further Research	Researcher(s) Who Suggested	Resulting Research Question(s)	Researcher's Assumptions
Applying organizational citizenship behavior (OCB) to teacher leadership in the United States	Oplatka, 2006 Podsakoff et al., 2000	3. How, when, and why do some teachers develop into informal teacher leaders while others do not? (A) What conditions encourage informal teacher leaders to engage in OCBs, and how? (B) What conditions discourage teachers from acting as informal teacher leaders or engaging in OCBs, and how?	The behaviors unique to informal teacher leaders can be classified as examples of OCBs. Supportive school administrators and colleagues encourage teachers to lead informally and engage in OCBs, while unsupportive school administrators and colleagues discourage teachers from acting as informal teacher leaders or engaging in OCBs. Teachers who keep their focus on student achievement develop into informal teacher leaders; teachers who are discouraged to lead due to conditions present within their schools refrain from leading or engaging in OCBs. Also, school size may be a factor in determining the emergence of informal teacher leaders willing to exercise OCBs.

The three research questions presented above in Table 4 helped me to explore informal teacher leadership through the rich descriptions of informal leadership activities offered by the educators I interviewed. However, the questions, distinctively written for a qualitative study, did not allow me to comprehend all aspects of informal teacher leadership – namely those best investigated quantitatively. The next section of this chapter discusses both strengths and limitations of this qualitative inquiry.

1.4   STRENGTHS AND LIMITATIONS OF THIS STUDY

This study has both strengths and limitations. Although the strengths add to the credibility and validity of the study, the limitations will need to be addressed in future studies of informal teacher leadership. Both strengths and limitations are discussed in the following two sections.

1.4.1   Strengths

Four strengths of this study are identified. First, it addresses gaps in the literature on teacher leadership. As explained above, the subject of teacher leadership needs expanded (Crowther, 1996) by researchers willing to learn the personal perspectives of teacher leaders (Gehrke, 1991). This study meets these needs.

Next, this study began to define, or situate, informal teacher leadership for school administrators who wish to empower teachers who wish to act as informal leaders. Since researchers have proven the importance of administrators distributing leadership responsibilities (Elmore, 2000; Spillane et al., 2001) in this current age of school reform enacted to improve

student achievement (Lieberman & Miller, 2005; York-Barr & Duke, 2004), middle school leaders may be able to use findings from this study in order to establish a sturdy foundation for informal teacher leadership in their respective schools. For example, mapping informal teacher leadership in suburban middle schools may help sharpen definitions of informal teacher leadership so that conflicts deriving from ambiguity and uncertainty of role expectations are minimized. And the results of this study might offer school leaders a greater understanding of the type of school environments they need to create if they wish to encourage and sustain informal teacher leadership in their schools.

Third, this study provided respondents with an opportunity to think deeply about their respective practices. According to Valli (1997), reflective practice is an integral component of educators' success. As Cook (1998) noted, teacher reflection improves teaching. Since during formal interviews respondents will be asked to reflect upon their experiences, they may improve their practices as a result.

Finally, this study helped me grow both professionally and personally. As a novice, I anticipated enhanced research skills as a result of this study. I also predicted an improved understanding of a topic on which I have remained passionate for many years. And I feel certain that from this study, I emerged with a, more accurate perception of myself as an educator.

1.4.2   Limitations

Although this study may help school leaders better understand the intangible nature of informal teacher leadership and encourage the conditions necessary to promote its growth, it has a number of limitations. First, because this study involved only two suburban middle schools in Southwestern PA, the findings may not be generalized to all school settings. Informal teacher

leaders may behave quite differently in diverse environments (However, this point substantiates the importance of regarding informal teacher leadership as a situational construct).

Another limitation resulted from my position as a qualitative researcher: that it was less important to discover what is "real" than it is to learn what factors contribute to respondents' subjective understandings of reality. Aiming to build an understanding of respondents' "lived" experiences, I studied how they interpret the world around them and how this influences their actions. The particular experiences respondents shared with me may not have been similar to experiences others would have shared with me if given the opportunity. However, during this study, patterns of behavior began to emerge, and a theoretical understanding of why informal teacher leaders engage in certain behaviors was presented so that future research can be conducted to discover information general to a larger population of informal teacher leaders.

Next, because school principals acknowledged informal teacher leaders according to the criteria explained above, bias may exist. For example, whereas one supervisor might have identified a particular employee for the purposes of this study, another supervisor – if given the opportunity – might have argued that the employee recognized did not fit the description of an informal teacher leader. Since the study was conducted using only those participants categorized by their current, immediate supervisors as informal teacher leaders, it was limited in scope.

Additionally, I used semi-structured, in depth interviews to gather data about respondents' experiences and perceptions of the phenomenon under study. I did not observe their behaviors while working; therefore, I was unable to determine if their actual behaviors corresponded to their reported behaviors.

Finally, my limited experience as a qualitative researcher might have weakened this study. Since I represent the key data collection instrument, the quality of the research depended

upon my ability as a researcher, and my personal biases and idiosyncrasies might have influenced results. Additionally, I transcribed at least 30 hours of audio-recorded interviews; thus, the mere volume of data collected made analysis and interpretation rather challenging. For this reason, I relied heavily upon methods of triangulation (as explained in Chapter 3).

The next chapter of this document provides a thorough synthesis and analysis of literature related to this study. This chapter also illuminates theory used to substantiate the choice of topic investigated and methodology employed. Finally, Chapter 2 presents researchers' suggestions for future studies that influenced the design of this study.

2.0   REVIEW OF LITERATURE

The intent of this chapter is to amass and discuss recently published empirical evidence that helps

educators interested in teacher leadership answer the following questions:

1. What is teacher leadership and how are teacher leaders described in the literature?

2. How does formal teacher leadership differ from informal teacher leadership, and what types of roles do formal and informal teacher leaders assume?

3. What recent changes in organizational structure and national school reform initiatives have resulted in the emergence of teacher leaders, and specifically, those who assume informal roles?

4. What school related factors contribute to teacher leadership?

5. What barriers impede teacher leadership?

6. What is organizational citizenship behavior and how does this phenomenon apply to teacher leadership?

In addition to addressing the aforementioned questions, this exegesis of literature serves

two other purposes. First, it attempts to elucidate the abstract nature of teacher leadership; it

serves to convey an intangible concept in more concrete terms. Next, it provides the framework

for a qualitative study which attempts to reveal informal teacher leaders' perceptions of their

roles as change agents who regularly interact with both administrators and colleagues by

engaging in extra-role behavior beyond that which is expected of them as per the terms of their contractual agreements.

For the review of literature, I read and annotated approximately 175 peer-reviewed articles, 20 articles that were not peer reviewed (yet were applicable to this study), 15 papers presented at national conferences, and 15 books. As common themes among readings began to surface, information was organized according to: (a) definitions of teacher leadership; (b) tenets of teacher leadership, or characteristics of teacher leaders; (c) teacher leadership and school culture; (d) administrators' influence on teacher leadership; (e) barriers to teacher leadership; and (f) studies of teacher leadership. A number of sub-themes became evident, and content was ordered under the previously mentioned overarching themes, which provided the organizational arrangement for the review.

2.1   WHAT IS TEACHER LEADERSHIP AND HOW ARE TEACHER LEADERS DESCRIBED IN THE LITERATURE?

The notion of teacher leadership is difficult to articulate. Although many definitions have surfaced, those common to the existing literature characterize teacher leadership in terms of the behaviors and personal qualities demonstrated by teacher leaders. The multiple definitions that have emerged from the field often combine descriptions of teacher leaders' behaviors and personal qualities in order to explicate the theoretical nature of teacher leadership.

Lambert (2003) noted that although the concept of leadership has been studied for hundreds of years, no one can agree on a single definition of leadership, much less teacher leadership. Even teacher leaders struggle to understand their roles because the concept of

teacher leadership is abstract. Teacher leaders' behavior and personal qualities vary greatly among contexts and environments; therefore, many competing definitions of teacher leadership have surfaced. However, upon thorough investigation, some commonalities among definitions begin to appear. What follows is an explanation of teacher leadership that focuses on how current literature describes teacher leaders. Table 5 summarizes the most common, general definitions of teacher leadership as determined by behaviors shared by most teacher leaders.

Table 5 Common Behaviors of Teacher Leaders

Author (Date)	Behaviors of Teacher Leaders
Silva, Gimbert, and Nolan (2000)	Navigate the structure of schools, nurture relationships, model professional growth, encourage change, and challenge the status quo
Harris (2003)	Coach, mentor lead working groups and developmental tasks, and model effective forms of instruction
Lieberman, Saxl, and Miles (1988)	Build trust and rapport, diagnose organizational needs, deal with change, handle resources, manage, and build confidence in others

2.1.1   What is Teacher Leadership?

A number of researchers have tried to explicate teacher leadership in a more tangible way (Barth, 2000; Danielson, 2007; Frost & Durrant, 2003; Harris, 2003; Lambert, 1998, 2003; Lieberman, Saxl, & Miles, 1988; Katzenmeyer & Moller, 2001; York-Barr & Duke, 2004). For example, Silva, Gimbert, and Nolan (2000) articulated that teacher leaders, "navigate the structures of schools, nurture relationships, model professional growth, encourage change, and challenge the status quo" (p. 22). Harris (2003) explained that teacher leaders coach, mentor and lead working groups and developmental tasks central to improving learning and teaching, all the

while modeling effective forms of instruction. Concentrating on more tangible aspects of teacher leadership, Lieberman, Saxl, and Miles (1988) attempted to categorize teacher leadership according to particular behaviors. They discovered that teacher leaders possess a set of 18 skills that fall into six categories: (a) building trust and rapport, (b) diagnosing the needs of the organization, (c) dealing with the processes of change, (d) utilizing resources, (e) managing the work, and (f) building skill and confidence in others. These categories represent an early attempt to frame teacher leadership, an intangible ideal.

Although researchers have been able to describe the work of teacher leaders in terms of the skills teacher leaders possess, concretely defining teacher leadership continues to present a challenge. Because teacher leadership is situational – teacher leaders often assume undefined roles as a result of their willingness to extend themselves beyond traditional classroom boundaries (Danielson, 2007; Wilson, 1993) – researchers have an extremely difficult time settling upon a universal definition of the term.

Despite numerous differences, some of the more recent literature which builds upon the findings of Lieberman et al. (1988) expresses that teacher leaders: (a) influence their colleagues without using power, (b) establish and sustain collegial relationships through collaboration with peers, (c) maintain a strong sense of purpose, and (d) extend themselves beyond traditional classroom boundaries. To frame the concept of teacher leadership, this review of literature focuses on these four behaviors of teacher leaders.

An overarching defining factor of teacher leadership commonly explained in the literature and based upon the four aforementioned points is teacher leaders' power to shape the profession positively by acting as stewards for change (Lieberman & Miller, 2005; Phelps, 2008). In this review of literature, teacher leaders' enactment of change is not discussed

separately because their desire to affect change is the underlying reason for all teacher leader behaviors cited. However, teacher leaders' four behaviors stemming from their recognition of the need for change, and ultimately school reform, are summarized in the remainder of this section. Figure 1 provides an overview of the next four sections of the literature review.
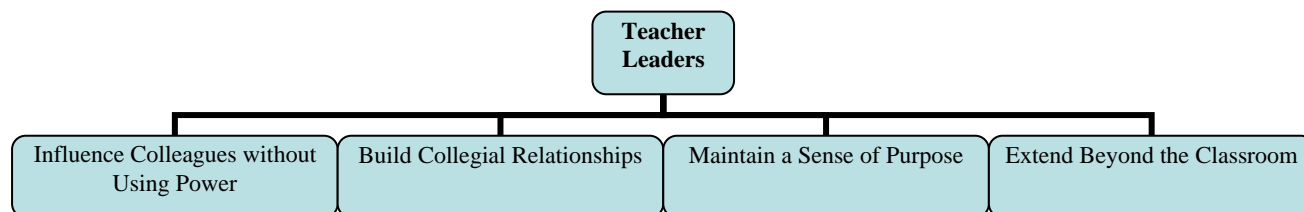
Figure 1: Behaviors that Reflect Teacher Leadership

2.1.1.1 Teacher Leaders Influence Their Colleagues without Using Power

In their extensive review of literature, York-Barr and Duke (2004) attempted to answer the question: "What are teacher leaders?" They discovered that most literature devoted to answering this question indicates that teacher leaders have or have had significant teaching experience, are known to be outstanding practitioners, and are respected by their colleagues. After presenting many definitions of teacher leadership, the authors endorsed the following: "Teacher leadership is the process by which teachers, individually or collectively, influence their colleagues, principals, and other members of the school communities to improve teaching and learning practices with the aim of increased student learning and achievement" (p. 287-288).

Although teacher leaders influence their peers and administrators to improve teaching and learning with the goal of fomenting student achievement (York-Barr & Duke, 2004), they do so without exercising power in the traditional sense. Table 6 presents a summary of studies revealing that teacher leaders do not *force* colleagues to change, but instead encourage them to consider ways to improve their practice.

Table 6 Studies of Teacher Leaders' Ability to Influence Colleagues without Using Power

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Gonzales	2004	To report on eight years of a middle school's restructuring efforts	Comprehensive review of literature, and a historical review of artifacts from earlier, qualitative studies	Teacher leaders do not use power, but instead, fight for control of their work by encouraging colleagues to think about student achievement.
Donaldson	2007	To explore how teacher leaders behave	Qualitative case study of teacher leaders and their assets	Teacher leaders exude confidence, but do not use power to influence peers.
Pechman and King	1993	To determine facilitators and hindrances to school restructuring efforts	Three urban and three non-urban schools were studied extensively	Teacher leaders promoted faculty cohesiveness and commitment by behaving respectfully toward colleagues and supervisors.

For this review of literature, "power" refers to teacher leaders' impact to initiate and sustain school reform by exercising force in a manner that oppresses colleagues. Weber, as cited in Collins (1975, 2008), defined power as, "the ability to secure compliance against someone's will to do otherwise" (p. 236). In this sense, "power" refers to one group's ability to affect the behavior of another. Explaining in more detail, Bartnett (1984) noted that power, "is contingent on a person being dependent on the resources over which another person has access or control" (p. 44). Within the education system, power usually is placed into the hands of those who hold super ordinate position – school leaders (Elmore, 2000). For example, school principals simply can force teachers to supervise hallways during class changes despite their knowledge that teachers may wish to spend those few minutes preparing for the next class. Principals can discipline teachers who appear insubordinate; thus, as school leaders, they wield power.

As it becomes increasingly clear that teachers – school personnel who conventionally hold subordinate positions – possess the intellectual resources necessary to move their schools forward, teachers are beginning to act as school leaders (Danielson, 2007; Elmore, 2000). School leadership positions traditionally have been associated with power as defined above. Since power struggles often have served as the impetus to strained relations between school administrators and teachers, teachers who assume leadership responsibilities need to ensure that they influence their colleagues to change without using power (Collins, 2008). Otherwise, relationships between teacher leaders and their colleagues might become tense – a known barrier to teacher leadership (Johnson & Donaldson, 2007; Smylie & Denny, 1990).

According to the Task Force on Teacher Leadership (2001), teacher leadership is not about "teacher power." Instead, it is about tapping into the untapped abilities of teachers to improve student achievement, collaborate as colleagues, and tailor a shared or distributed leadership (Elmore, 2000) in the daily life of schools. Teacher leaders do not struggle for power; instead, they fight for control of their work (Gonzales, 2004). Simply, their goal is "to catalyze others to work as hard and care as deeply about what happens in classrooms and schools as they do" (Gonzales, 2004, p. 69).

The Task Force's (2001) conceptualization of how teachers need to influence their colleagues in lieu of power them aligns with Maeroff's (1988) ideas regarding teacher interaction. To combat the power struggles between super ordinates and subordinates that often interfere with the effective functioning of schools, he encouraged teachers to interact with each other – to engage in discourse about their profession with those in similar positions. According to Maeroff, this interaction not only results in improved teacher morale, but it also increases teachers' power as an occupational group. Ironically, teacher leaders' ability to influence their colleagues without

26

forcing them to change will empower all teachers (even those who choose not to lead) to make the changes necessary for advancement.

Frost and Durrant (2003) elucidated the notion of teacher leaders empowering their colleagues without exercising force; they distinguished between "power," as defined above, and the way in which teacher leaders can influence their peers. As they clarified, "power" does not always refer to leaders delegating orders, giving direction, or distributing leadership responsibility. Instead, power can involve a teacher leader's choice to start and maintain change regardless of his or her status within the organizational structure of the school. The authors support Giddens (1984), who wrote that teacher leadership is not a bottom-up power structure, but instead is about emphasizing collegial relationships among teachers.

Because they often work closely with administrators who lead school reform, teacher leaders can affect change. Donaldson (2007) commented on teacher leaders' status that often positions them somewhere between administrators and colleagues, thus compelling teacher leaders to decide whether or not to exercise authority and power (like administrators) when striving to achieve their goals. Like Frost and Durrant (2003) and Gonzales (2004), Donaldson cautioned against teacher leaders using muscle to force change. Instead, he encouraged teacher leaders to maintain strong collegial relationships while remaining candid about their points of view regardless of their intermediary positions. Although, according to Donaldson, teacher leaders typically exude confidence, they do not behave disrespectfully toward their superiors or colleagues. Instead, they shift between roles easily, and are careful to redefine their roles and responsibilities as dictated by situations that arise (Pechman & King, 1993).

Donaldson (2007) also commended teacher leaders for their capacity to nurture collegial relationships despite the pushes and pulls of their complex, intermediary roles. To help teacher

27

leaders reform their school districts, Donaldson proposed for schools a relational model of leadership that avoids placing teacher leaders in formal positions that scream "superiority" or "judgment." Instead, he recommended that teacher leaders build rapport with colleagues in order to further their schools' agendas of reform.

What follows is a discussion of teacher leaders' ability to cultivate and sustain collegial relationships. Since a number of researchers agree that the best way for teacher leaders to enact change without using power is to encourage collegiality (Collins, 2008; Donaldson, 2007; Giddens, 1984; York-Barr & Duke, 2004), this literature review details in the next section how teacher leaders build relationships.

2.1.1.2 Teacher Leaders Influence Their Colleagues through Collegial Relationships

Evident in the literature is the idea that teacher leaders influence colleagues *by* cultivating collegial relationships and fostering a culture of trust and collaboration among teachers, administrators, and students (Donaldson, 2007; Lieberman & Miller, 2005; Martin, 2007; Patterson & Patterson, 2004; Peckover, Peterson, Christiansen, & Covert, 2006; Sledge & Morehead, 2006; The Center for Comprehensive School Reform and Improvement, 2005; Wilson, 1993). Table 7 provides a summary of major studies that confirm teacher leaders' ability to establish and sustain collegial relationships with peers and supervisors.

Table 7 Studies of Teacher Leaders' Abilities to Establish Collegiality

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Olson	2005	To investigate how teacher leaders emerge	Qualitative study of 10 teachers with five or more years of experience, and who joined an 18-month long leadership institute	Teacher leaders influenced colleagues and built relationships through respect by discussing student learning, offering professional development, supporting the creation of learning communities, and listening quietly.
Harris	2002	To determine the extent to which particular demands of schools influence leadership styles	Fifty semi-structured interviews, including interviews with teacher leaders, were conducted, transcribed, and analyzed	Developing and maintaining collegial relationships was important to teacher leaders
Muijs and Harris	2003	To study how teacher leadership manifests itself in schools	Qualitative case study of three schools identified by key informants; interviews conducted; some data analyzed statistically using the *Student Newman Keuls Test*.	Relationship building was a priority in School A – the schools with the environment most conducive to the growth of teacher leaders.
Wasley	1991	To learn how teacher leaders from different parts of the country behave in leadership roles	In-depth, multi-case study conducted by spending two weeks observing and interviewing each participant in the study, as well as his or her colleagues	Teachers can serve as powerful leaders if they are able to work collegially with other teachers to encourage examination and reflection of instructional practices in an effort to improve student achievement.

Table 7 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Wilson	1993	To sketch a picture of teacher leaders	Four hundred teachers at six high schools were surveyed; 100 responded	Teacher leaders enable others to act by building collegial relationships with their peers.
Moller,Childs-Bowen, and Scrivner	2001	To illuminate the concept of teacher leadership	Evaluation of the SERVE Teachers of the Year Advisory Committee as an example of teacher leadership within a professional learning community.	Teacher leaders initiate change by fostering close relationships with colleagues.

Relating well to colleagues is a hallmark of teacher leadership. Martin (2007) defined a teacher leader as, "a person who leads by example, has credibility and expertise, is a problem solver, and relates well to others" (p. 18). The Center for Comprehensive School Reform and Improvement (2005) also holds cohering and strengthening collegial relationships as a central aspect of teacher leaders' work. Teacher leaders maintain collegial relationships by supporting the creation of learning communities, redirecting conversations around student learning, and offering professional development (Olson, 2005). Furthermore, teacher leaders relate to their peers by speaking their minds about what is best for students, bringing innovation to schools, and acting as stewards for change who positively shape the profession (Lieberman & Miller, 2005). Finally, teacher leaders strengthen relationships and build positive school cultures by maintaining a commitment to moral purpose and knowledge (Fullan, 1994).

As part of his relational model of teacher leadership (introduced above), Donaldson (2007) suggested that teacher leaders develop and maintain a good rapport with their colleagues. According to Donaldson, teacher leaders who work alongside colleagues in the trenches can

augment relationships by earning the trust and respect of their peers. Teacher leaders are those who have demonstrated success in the eyes of their colleagues who admire them as role models, and who trust them enough to allow them to lead. Donaldson explained that sometimes, teacher leaders will work in naturally occurring, informal groups or structures that originate as a result of collegial relationships that form because teachers trust and respect each other.

Even competing explanations of teacher leadership have in common the point that teacher leaders influence peers through the establishment and perpetuation of collegial relationships. Harris (2002), and Muijs and Harris (2003), who extensively researched the subject of teacher leadership, purposefully acknowledged conflicting definitions of the term. In their comprehensive reviews of literature, they referenced a number of commonly cited and somewhat opposing definitions (briefly mentioned below), all of which converge upon a single idea: Teacher leaders must form relationships with their colleagues if they wish to lead them. For example, some researchers perceive teacher leadership as a form of collective leadership in which teacher leaders develop expertise by working collaboratively (Boles & Troen, 1994; Hargreaves, 1991; and Snell & Swanson, 2000). Others link teacher leadership mainly to teachers' ability to encourage colleagues to change (Wasley, 1991) or improve their practice (Katzenmeyer & Moller, 2001). However, whether individually or collectively, teacher leaders nurture relationships with their colleagues and encourage them to improve student achievement (York-Barr & Duke, 2004) – the ultimate goal of schools.

Lambert (1998) contended that to build relationships, teacher leaders need to perceive teacher leadership as a verb in lieu of a noun. This way, teacher leaders will consider the processes, activities, and relationships in which they engage, rather than themselves in a specific role. Hence, she described leadership as, "the reciprocal learning processes that enable

31

participants in a community to construct meaning toward a shared purpose" (p. 18). Within her view of "constructivist leadership" is the notion that teachers, who always have attended to the needs of students and themselves, now should attend to the learning needs of their colleagues.

Danielson (2007) also recognized teacher leaders as those who impact student achievement by relating to and influencing their colleagues to attend to students' needs. As Danielson explained, "Teacher leaders are those who come to the conclusions that students' experiences depend not only upon students' interaction with teachers, but also upon teachers' interaction with each other" (p. 14). She believes that teachers' awareness of the need for interaction with colleagues prompts them to want to influence change within their schools. Barth (2006) asserted, "The nature of relationships among the adults within a school has a greater influence on the character and quality of that school and on student accomplishment than anything else" (p. 8).

Other researchers revealed that teacher leaders are master collaborators who recognize that communication with peers is critical if they want to move their school districts forward. Wilson (1993), for example, studied teacher leaders' characteristics and discovered that they are gifted at forging close relationships with peers. Years later, Sledge and Morehead (2006) confirmed that the qualities necessary for teacher leadership include strong interpersonal skills. They stated, "Teacher leaders need to collaborate with their colleagues to positively affect their attitudes and beliefs about student achievement" (p. 8). Finally, in their study of Teachers of the Year, Moller, Childs-Bowen, and Scrivner (2001) emphasized teacher leaders' talent for initiating change by fostering close relationships with colleagues.

Teacher leaders' capacity to affect change derives from their recognition of the need for school reform and increased student achievement. Essentially, teacher leaders retain a sense of

purpose, or an understanding of how they might transform current practices. Teacher leaders'

sense of purpose, which helps them to focus on their goals, is discussed in the next section.

2.1.1.3 Teacher Leaders Maintain a Strong Sense of Purpose

Aside from understanding how to establish and sustain collegial relationships without exercising

power, teacher leaders demonstrate confidence and maintain a sense of purpose (Donaldson,

2007; Dozier, 2007; Fullan, 1994; Howey, 1988; Lambert, 2003; Wasley, 1991). Specific

studies revealing this behavior of teacher leaders are presented in Table 8.

Table 8 Studies of Teacher Leaders' Strong Sense of Purpose

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Donaldson	2007	To determine the behavior of teacher leaders	Qualitative case study of teacher leaders and their assets	Teacher leaders maintain a strong sense of purpose – to assist their colleagues – that results from maintaining collegial relationships.
Dozier	2007	To explore whether or not teachers are ready for their new leadership roles	Online survey of 300 highly qualified teachers in the United States	Teachers recognized for excellence are confident in their new leadership roles even though they lack training.

Donaldson (2007) named "maintaining a sense of purpose" the second aspect of his

relational leadership model (The first aspect is teacher leaders' ability to maintain collegial

relationships, discussed above). To build on a sense of purpose, teacher leaders engage their

colleagues in professional dialogue to decide which issues need immediate attention. Then, they

establish their purpose and motivate colleagues to assist them in achieving their goals of improved

student achievement. Donaldson argued, "…teacher leaders use their relational base to help their colleagues keep their eyes on the prize" (p. 27).

To Lambert (2003), "a teacher leader may be seen as a person in whom the dream of making a difference has been kept alive, or has been reawakened by engaging colleagues and a professional culture" (p. 422). She went on to explain that teacher leaders who understand their purposes are inquisitive and reflective, and "accept responsibility for students' learning and have a strong sense of self" (p. 422). Lambert clarified that a teacher leader with a "strong sense of self" knows his or her values and intentions, and is not intimidated by others' inaction.

A "strong sense of self" (Lambert, 2003) might prompt teacher leaders to act. Like Wasley (1991) and Lambert (2003), Howey (1988) associated leadership and action. He defined leadership as, "coalescing others to act when they otherwise might not have" (p. 28). Also, he explained that teacher leadership is, "proven in the efforts of others to attempt to scale heights of human achievement and plunge depths of human caring not otherwise envisioned" (p. 28).

Some researchers believe that teacher leaders' sense of purpose or sense of self grows from their high levels of confidence. Dozier (2007) discovered that teacher leaders exude confidence. He examined teachers who were recognized for excellence and the leadership roles they subsequently assumed. Dozier found that teacher leaders recognized for their superiority were confident and willing to engage in many leadership roles that they sought actively. His findings substantiated the idea that teacher leaders will invent opportunities to exercise their influence (Lieberman & Miller, 2005), perhaps due to a sense of "professional restlessness" (Danielson, 2007), a drive toward a greater, moral purpose (Fullan, 1994), or a thorough understanding of themselves (Lambert, 2003).

Whether teachers choose to lead because they maintain a sense of purpose (Donaldson, 2007) or sense of self (Lambert, 2003), desire for more responsibility (Danielson, 2007), believe sharing knowledge and expertise is the right thing to do (Fullan, 1994), or feel jaded or frustrated executing the same tasks year after year (Danielson, 2007), all teacher leaders broaden their practices by working outside their classrooms. What follows is a discussion of teacher leaders' eagerness to break from their traditional roles as classroom teachers.

2.1.1.4 Teacher Leaders Extend Themselves Beyond Traditional Classroom Boundaries

Because they maintain a sense of purpose, teacher leaders assume duties that extend beyond the classroom (Blasé & Blasé, 2000; Danielson, 2007; Donaldson, 2007; Fullan & Hargreaves, 1996; Gehrke, 1991; Katzenmeyer & Moller, 2001; Lieberman & Miller, 2005; Wilson, 1993). Studies substantiating this universal attribute of teacher leaders are summarized in Table 9.

Table 9 Studies of Teacher Leaders' Extension beyond Their Classrooms

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Blasé and Blasé	2000	To explore how principals can impact teachers and the culture of their schools	Data were collected from 285 teachers in 11 schools	Shared leadership is necessary for teacher empowerment to occur.
Wilson	1993	To sketch a picture of teacher leaders	Four hundred teachers at six high schools were surveyed; 100 teachers responded.	Teacher leaders are willing to sponsor extracurricular activities that extend their responsibilities beyond the classroom.

Frequently referenced in the literature, Katzenmeyer's and Moller's (2001) definition of teacher leadership focused on the belief that, "Teachers who are leaders (and) lead within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders,

and influence others toward improved educational practice" (p. 5). This definition encompasses the idea that teacher leadership extends beyond the classroom – a point common in the literature on teacher leadership.

According to Gehrke (1991), teacher leaders often teach full-time or part-time and assume additional responsibilities. As Fullan and Hargreaves (1996) explained, teacher leadership is "the capacity and commitment to contribute beyond one's classroom" (p. 32). Similarly, Blasé and Blasé (2000) mentioned that teacher leaders remain responsible for decision making and activities outside their classroom environments. In her study of teacher leadership, Wilson (1993) learned that teacher leaders sponsored extracurricular activities, thus illustrating their willingness to assume responsibilities beyond the classroom.

Like Katzenmeyer and Moller (2001), Gehrke (1991), and Wilson (1993), Lieberman and Miller (2005) had accredited teacher leaders for their readiness and self-confidence to extend their expertise beyond the classroom. They declared that teacher leadership stems from classroom teaching, and that adept teacher leaders use the same kind of good teaching practices when working with adults. Purposely, they create a community of colleagues who share and learn; they "demonstrate instead of remonstrate." Teacher leaders differentiate their leadership for particular colleagues or audiences as they are willing to extend themselves beyond their classrooms and "go public with their work" (Lieberman & Miller, 2005). Essentially, they shape their schools by modeling what they care about as teachers and as leaders.

Self-motivated teachers who expand their practice outside their classrooms clearly are prepared to take risks. Those who "go public with their work" (Lieberman & Miller, 2005) subject themselves to criticism from colleagues. Nevertheless, teacher leaders persist because they

keep their focus on improving their schools and their students' achievement. These behaviors and qualities of teacher leaders, as well as others presented in the literature, are detailed next.

2.1.2 How Are the Behaviors and Qualities of Teacher Leaders Described in the Literature?

Essentially, the behaviors or work of teacher leaders defines the notion of teacher leadership. Most often, the literature does not differentiate among definitions of teacher leadership, teacher leaders' behavior and teacher leaders' personal qualities because they are interrelated. Although this writing discusses teacher leaders' behavior and personal qualities separately, some information overlaps as it is linked conceptually. In addition to affecting change by influencing colleagues without using power, garnering collegial relationships within schools, espousing a strong sense of purpose, and assuming responsibilities that extend beyond traditional classroom boundaries, teacher leaders collectively possess the personal qualities outlined below. Table 10 provides a summary of teacher leaders' behavior and personal qualities. And Table 11 reviews studies conducted to determine the personal qualities that teacher leaders possess.

Table 10 A Summary of Teacher Leaders' Behaviors and Personal Qualities

Behaviors of Teacher Leaders		Personal Qualities of Teacher Leaders
Nurture school culture Take risks Reflect upon practice Focus on students Engage in professional development Understand school politics	TEACHER LEADERS	Self-motivated Willingness to take risks Intrapersonal Life-long learners Enthusiastic Creative

Table 11 Studies Revealing Teacher Leaders' Personal Qualities

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Wilson	1993	To sketch a picture of teacher leaders	Four hundred teachers at six high schools were surveyed; 100 teachers responded	Teacher leaders are hard working, highly involved in curriculum and instruction, creative, motivated, inspirational, gregarious, available, risk takers, and role models.
Moller et al.	2001	To study teachers' personal experience with leadership	Qualitative study of Teachers of the Year, who were asked to comment on their experiences as teacher leaders	Teacher leaders focus on student achievement and leading, provide professional development for peers, seek learning opportunities, and work with lawmakers and policymakers.
Crowther, Kaagen, Ferguson, and Hann	2002	To introduce a new paradigm in educational leadership and and suggest a practical framework for schools	In-depth research project spanning five years	Educational leadership needs to be redefined to elevate the perception, status, and role of classroom teachers.

Wilson (1993) was among the first to document the specific behaviors and qualities of teacher leaders. Essentially, her findings painted a first picture of informal teacher leadership in action (Informal teacher leadership is discussed in the next section), although Wilson did not describe the teacher leaders she studied as "informal teacher leaders." She discovered that teacher leaders are: (a) hard working, (b) highly involved in curriculum and instruction, (c) creative, (d) motivators to students from different backgrounds and of different ability levels, (e) gregarious, (f) available, and (g) energetic. Furthermore, Wilson learned that teacher leaders are risk takers who capitalize on opportunities and enable others to act, and are role models for their colleagues.

Like Wilson (1993), The Center for Comprehensive School Reform and Improvement (2005) acknowledged readiness to take risks as a principal quality of teacher leaders.

Additionally, The Center referred to a number of teacher leader duties which help to exemplify the behaviors they demonstrate: (a) participation in school based decision making, (b) sharing of knowledge with colleagues, (c) engagement in continuous action research, and (d) frequent reflection upon their work.

As a result of their study of Teachers of the Year, Moller et al. (2001) revealed a number of qualities that teacher leaders possess. Aside from teacher leaders' ability to forge close relationships with colleagues (explained above), they found that teacher leaders: (a) maintain a constant focus on student achievement, (b) seek life-long learning opportunities, (c) artfully use facilitation and presentation skills, (d) plan and organize, and (e) understand the politics of schools.

Some researchers discovered that teacher leaders help their colleagues grow by sharing their own professional inquiries. Donaldson (2007) acknowledged improving instructional practice as the final point of his three-pronged relational model of leadership. Likewise, Lieberman and Miller (2005) learned that teacher leaders inquire into their own practice and model life-long learning. Additionally, they reported that teacher leaders: (a) discover and even invent opportunities to lead, (b) lead communities of practice and encourage risk taking, (c) create safe environments for novice and veteran teachers, (d) remain sensitive to context and culture and differentiate their coaching accordingly, and (e) create an environment that positively influences both teachers and students.

Crowther, Kaagen, Ferguson, and Hann (2002) organized the behavior of teacher leaders into a six-point framework frequently referenced in the literature. Their framework was intended to capture the essence of how teacher leaders work, regardless of their positions. To Crowther et al., teacher leaders: (a) nurture a culture of success, (b) convey convictions about a better world,

39

(c) facilitate communities of learning through organization-wide processes, (d) confront barriers in the school's culture and structures, (e) translate ideas into action, and (f) strive for authenticity in teaching.

No matter how teacher leaders are described in the literature, the research indicates that teacher leaders possess an ability to enact change because of their self-motivation (Wilson, 1993), willingness to take risks (Crowther et al., 2002; Lieberman & Miller, 2005), and eagerness to reflect upon their professional practices (The Center for Comprehensive School Reform and Improvement, 2005). Taken into consideration, these qualities, as well as the four behaviors of teacher leaders that help to describe the concept of teacher leadership, help to illuminate the abstract nature of teacher leaders' work. To further clarify the subject of teacher leadership, the two types of teacher leaders and the roles they assume are outlined in Section 2.2.

2.1.3   Summaries of Definitions of Teacher Leadership and Descriptions of Teacher Leaders

Because of its abstract nature, the concept of teacher leadership is difficult to articulate; no researchers can agree on a single definition of the term (Lambert, 2003). However, the literature collectively has described teacher leaders as educators who positively influence their peers by establishing and sustaining collegial relationships for the purpose of affecting change (Lieberman & Miller, 2005; York-Barr & Duke, 2004). Teacher leaders also possess a strong sense of purpose (Donaldson, 2007; Lambert, 2003) as they fight for control of their work (Gonzales, 2004), but they do not force colleagues to uphold the same values as they (Frost & Durrant, 2003). Instead, because they are willing to take their work outside their respective classrooms (Fullan & Hargreaves, 1996; Wilson, 1993), teacher leaders encourage and guide colleagues to change by

interacting with them (Danielson, 2007). Teacher leaders shine as risk takers and role models to their colleagues (The Center for Comprehensive School Reform and Improvement, 2005; Wilson, 1993). As life-long learners, they reflect upon their practice to continue improving student achievement. Finally, teacher leaders are cultivators of school culture because they understand the politics of their schools and the needs of their peers (Moller et al., 2001).

2.2 HOW DOES FORMAL TEACHER LEADERSHIP DIFFER FROM INFORMAL TEACHER LEADERSHIP, AND WHAT TYPES OF ROLES DO FORMAL AND INFORMAL TEACHER LEADERS ASSUME?

Just as it is difficult to distinguish between definitions of teacher leaders' behaviors and explanations of their personal qualities, it is complicated to disconnect types of teacher leadership from the roles assumed. Nevertheless, this review of literature attempts to differentiate between formal and informal teacher leadership and the responsibilities undertaken by each type of teacher leader. Figure 2 illustrates the major difference between formal and informal teacher leadership.
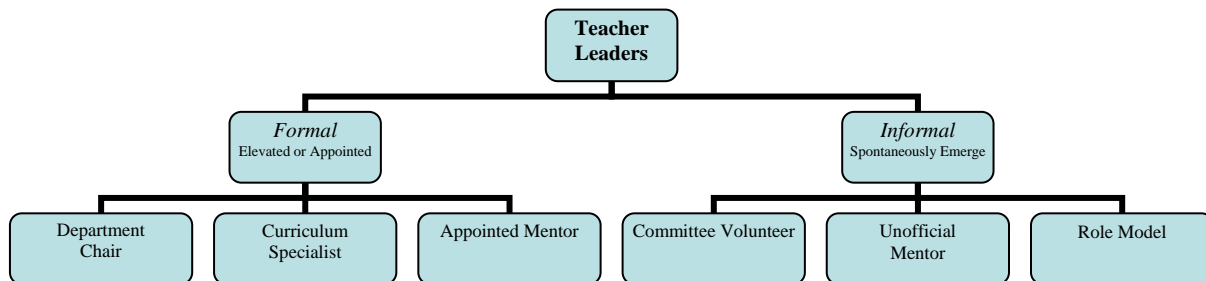
Figure 2 Differences Between Formal and Informal Teacher Leadership

2.2.1 Delineation between Formal and Informal Teacher Leadership

Teacher leadership can be sub-divided into formal and informal types, and the literature delineates between the two. Danielson (2007) offered a thorough explanation of both formal and informal teacher leadership. Formal teacher leaders, according to Danielson, are often chosen through a selection process after they apply for their positions, and they usually receive training for their responsibilities. Informal teacher leaders, conversely, emerge spontaneously from the teacher ranks. Danielson determined that they are not selected officially, but instead take the initiative to address areas of concern or impact change. They have no positional authority; instead, their influence stems from the respect they command from their colleagues due to their subject or pedagogical expertise, and outstanding practice.

Harris (2003) also distinguished between the terms "formal" and "informal" in regard to leadership roles or responsibilities that teachers assume. She explained:

> Informal leadership constitutes (such) classroom-related functions as planning, communicating goals, regulating activities, created a pleasant workplace environment, supervising, motivating those supervised, and evaluating the performance of those supervised. In contrast, formal leadership roles encompass responsibilities such as subject coordinator head of department or head of year, often moving away from the classroom to achieve this. (p. 314)

To Martin (2007), formal teacher leaders are those individuals who either are assigned roles or volunteer to lead. Conversely, informal teacher leaders are those excellent classroom teachers who maintain well managed classrooms filled with productive students.

Like Danielson (2007) and Martin (2007), Patterson and Patterson (2004) noted that formal teacher leaders generally are identified or appointed by school principals whereas informal leaders

are those whose colleagues recognize them because of their credibility, expertise, or relationship-building skills. Whether formal or informal, Patterson and Patterson acknowledged teacher leaders' power in terms of sparking change and sustaining school reform. How teacher leaders engender change depends upon the types of roles they assume. What follows is a discussion of the roles and responsibilities assumed by formal and informal teacher leaders.

2.2.2   Roles Assumed by Formal Teacher Leaders

The literature details a number of roles assumed by formal teacher leaders, including:
(a) department head, (b) curriculum specialist, (c) appointed mentor teacher, and (d) Teacher of the Year. Formal teacher leaders who were appointed to their positions assume various responsibilities, but most serve as middle managers between administrators and teachers. The literature primarily regards subject leaders or department chairs as formal teacher leaders (Danielson, 2007; Hannay & Ross, 1999; Leithwood, 1997; Little, 1995; Poultney, 2007; The Center for Comprehensive School Reform, 2005). Studies describing particular roles of formal teacher leaders are presented in Table 12.

Table 12 Studies of Formal Teacher Leadership

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Hannay and Ross	1999	To study how school culture is affected when middle management roles are restructured	Department heads and co-chairs of restructuring committees in 22 secondary schools were interviewed and asked to complete questionnaires	Department heads perform managerial tasks that place them in between administrators and colleagues. If this structure is challenged, then more options for leadership become apparent.
Poultney	2007	To study formal subject leaders' perspectives on leadership as related to their roles	Subject leaders in 11 schools were interviewed and sent questionnaires to complete	Subject leaders have to understand the intermediary nature of their role because they both manage and lead their departments. To lead effectively, subject leaders have to build trust and rapport.
Little	1995	To describe tensions surrounding teacher leaders' assumption of their roles	Using the idea of "contested ground," two high schools were examined qualitatively	Department heads are the most common teacher leaders, but there is no widely known or accepted role for them to play.

Hannay and Ross (1999) studied formal teacher leadership structure as it applies to Canada's middle management model. In this model, department heads enact a sort of middle management between administrators and colleagues. According to Hannay and Ross, this middle management model has shaped the culture of many secondary schools in Canada and America because colleagues frequently consider department heads' duties extensions of administrators' responsibilities. Basically, teachers often view department heads as supervisors as opposed to peer leaders.

American literature on teacher leadership also reflects the idea that formal teacher leaders serve as middle managers who assist principals with administrative responsibilities. Like Hannay and Ross (1999), Poultney (2007) equated leading a department with formal teacher leadership. She also noted that subject leaders (or department heads) perform middle management level tasks. By examining formal teacher leadership in 11 schools, Poultney concluded that subject leaders have to understand their dual role of both managing and leading their departments. While organizing and managing to direct their departments effectively, subject leaders also struggle to remain "professionally equal" to their staff members. Poutney discovered that to build trust and rapport with staff members, subject leaders exercise interpersonal skills to bring their colleagues together as a team of professionals striving to improve teaching and learning.

Gabriel (2005), a former department head, noticed an absence of literature written for formal teacher leaders who wish to learn how to engage in their roles. He categorized the charge of formal teacher leaders, primarily department heads, into four broad areas that exemplify formal teacher leaders' responsibilities. Through "dynamic leadership," department heads can:
(a) influence school culture, (b) build and maintain a successful team, (c) equip other potential teacher leaders, and (d) enhance and improve student achievement.

Not all formal teacher leaders act as department chairs; however, all formal teacher leaders officially are elevated to their positions. Baumgartner (2000) discussed formal teacher leadership and named himself as an example of a formal teacher leader who was promoted to his position. By portraying himself as "a teacher leader who never planned to become one," Baumgartner described how after receiving the title of Georgia's National Teacher of the Year in 1998, he was elevated by school leaders to the ranks of formal teacher leader. As an esteemed teacher, Baumgartner collaborated with other Teachers of the Year, and worked alongside high level administrators and policy makers from all over America. Although asked for his opinions and advice, Baumgartner protested that since his formal teacher leadership role was scripted, he was unable to affect change beyond being able to discuss areas of personal concern.

No matter their specific titles, formal teacher leaders perform a wide range of critical tasks (Fullan, 1994). Based upon her research, Little (1995) concluded that there is no widely known or accepted role for formal teacher leaders like department heads – the most common teacher leaders – because they are subject to local contexts that determine the nature of their work. The Center for Comprehensive School Reform and Improvement (2005) recognized that although such formal structures of teacher leadership and official tasks are necessary to a school's efficient functioning, they often remain the only avenues for which teachers might pursue leadership roles. The Center called for teacher leaders to expand their roles beyond these kinds of traditional formats and explore various forms of leadership. As Hannay and Ross (1999) observed, when dominant leadership structures are challenged, more options for leadership are generated and considered viable. Additional options for teacher leadership in a number of domains are described below in the discussion of informal teacher leadership roles.

2.2.3   Roles Assumed by Informal Teacher Leaders

Little (1995) discovered that in schools, teacher leaders typically serve as department heads, and their leadership becomes the precedent upon which teachers and administrators can judge the possibility for leadership in other capacities.   Regardless of the teacher leadership structures established within their schools, teachers need to recognize their faculty to bring about change. Teachers who focus their efforts on teaching and learning, and who demonstrate a high level of self-motivation, can initiate reform and work on their own time without formal appointment to their positions (Birky, Shelton, & Headley, 2006).   Teachers who regularly assume roles that are not named officially are known as informal teacher leaders.

The literature explains how informal teacher leaders conduct their work; however, the literature does not identify specific titles held by informal teacher leaders.   This is because informal teacher leaders do not assume authorized or official roles.   Instead, they embrace opportunities to influence change by accepting responsibility for the work that needs to be done.

Ackerman and Mackenzie (2006) believe that more teachers lead informally than formally. They claim that surely, formal roles still exist, but more teachers lead informally by sharing their expertise and classroom practice, asking questions of colleagues, mentoring new teachers, and modeling how to participate in a community of practice. Similarly, Patterson and Patterson (2004) described informal teacher leaders as those whose colleagues recognize them because of their credibility, expertise, or relationship-building skills. Some teachers are informal leaders who share their expertise, volunteer for new projects, and bring new ideas to the school. They offer leadership by assisting their colleagues to carry out their practice (Leithwood, 1997).

Katzenmeyer and Moller (2001) named leading students and partaking in decision making as examples of informal teacher leadership. Day and Harris (2003) included translating the

principles of school reform into practice, mediating as a source of expertise and information, and forging close relationships with colleagues and administrators as central tenets of informal teacher leadership.

Barth (2001) listed definite ways that informal teacher leaders might move their school districts forward. He suggested that informal teacher leaders exercise their influence by choosing instructional materials, shaping curricula, setting behavior standards, deciding placement of special education students, selecting new administrators and teachers, calculating the budget, and determining policies on promotion and retention of students. Many of Barth's suggestions about ways that teacher leaders might become involved reflect the literature's emphasis on the importance of teacher leaders sharing in decision making processes.

2.2.4   Summary of Formal and Informal Teacher Leadership and the Roles or Responsibilities Performed by Formal and Informal Teacher Leaders

Formal teacher leaders are those who either are appointed or elevated to official positions (Martin, 2007), such as department head or Teacher of the Year. Most often, formal teacher leaders act as middle managers who assume responsibilities regarded as extensions of administrators' duties (Hannay & Ross, 1999). Due to the intermediary nature of their roles, formal teacher leaders need to juggle management and leadership (Hannay & Ross, 1999; Poultney, 2007). They need to ensure the completion of tasks for which they are responsible all while building trust and earning the respect of peers (Donaldson, 2007).

Conversely, informal teacher leaders are those who emerge spontaneously from the teacher ranks as a result of their pedagogical expertise, extensive content knowledge, or ability to establish collegial relationships (Danielson, 2007; Patterson & Patterson, 2004). They volunteer for new

projects, share their expertise, bring fresh ideas to the forefront, and assist colleagues in carrying out their practice (Leithwood, 1997; Patterson & Patterson, 2004). Essentially, informal teacher leaders are the "foot soldiers" who move their school districts forward (Whitaker, 1995).

2.3 WHAT RECENT CHANGES IN ORGANIZATIONAL STRUCTURE AND NATIONAL SCHOOL REFORM INITIATIVES HAVE RESULTED IN THE EMERGENCE OF TEACHER LEADERS, AND SPECIFICALLY, THOSE WHO ASSUME INFORMAL ROLES?

Teacher leadership is not a new concept. As early as 1968, Jackson discussed formal leadership roles of teachers. However, the newer recognition of more expanded, informal roles of teacher leaders originated as a result of more recent understandings of organizational development (York-Barr & Duke, 2004), and the need for school reform (Rogus, 1988; Smylie & Denny, 1990). A prominent theme throughout the literature on teacher leadership is the thought that due to current school reform initiatives, sustained improvement in schools cannot occur without the efforts of teacher leaders (Danielson, 2007; Mayo, 2002).

The following sections of the literature review detail the recent changes in organizational structure and national school reform initiatives that provided the impetus for teacher leadership, and particularly, informal teacher leadership. Figure 3 presents a summary of the events leading to the emergence of informal teacher leaders (represented as ITL).
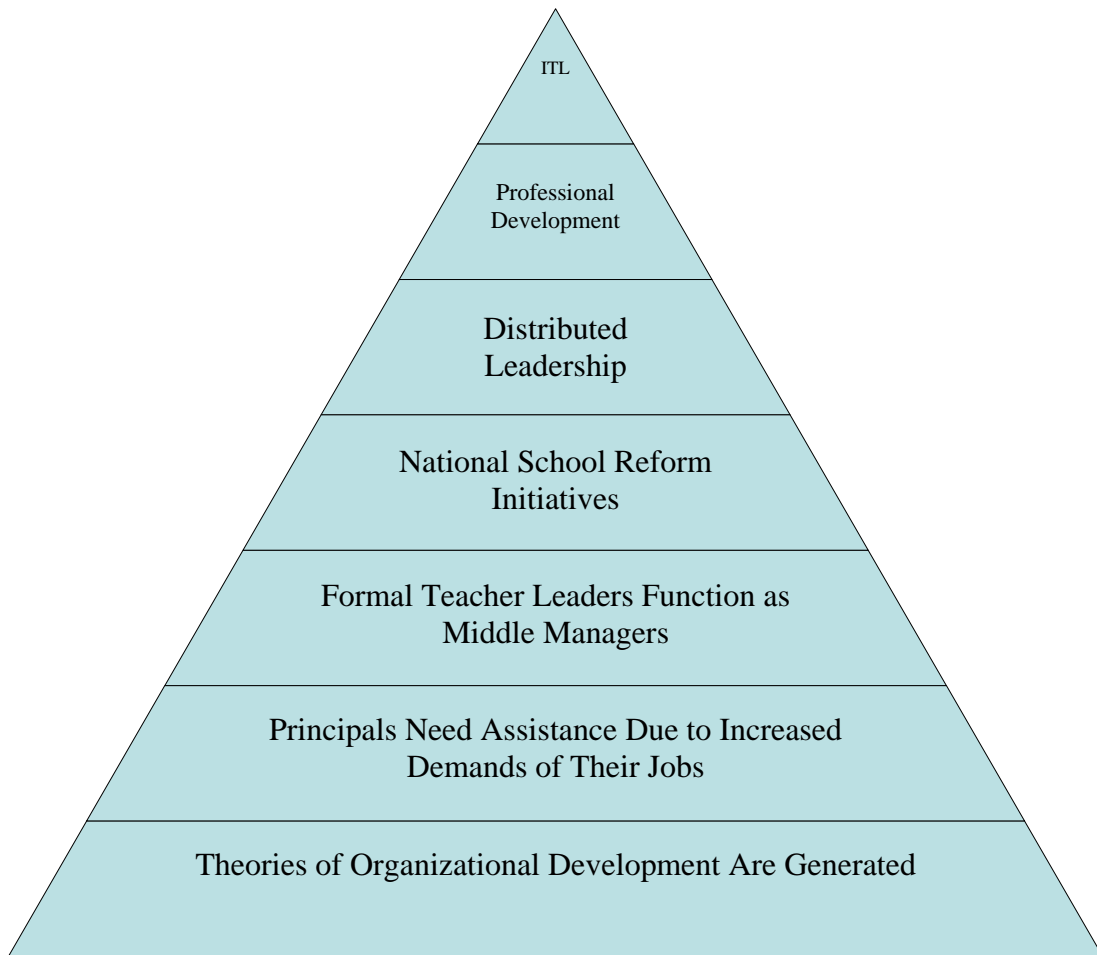
Figure 3 The Development of Informal Teacher Leadership (ITL) as a School Reform Initiative

2.3.1 Changes in Organizational Structure Resulting in the Emergence of Teacher Leaders

The current model of teacher leadership that includes the work of informal teacher leaders derived from transformations regarding leadership practices resulting from structural change in organizations. Lambert (2003) perceives a connection between teacher leadership and organizational structure. She maintained that disagreements about organizational operations stem from school administrators' assumptions of a hierarchical view of power and authority that rests with one leader who oversees the entire organization. Hart (1995), who documented this vertical model of power before Lambert, commented: "For most of the Twentieth Century, education modeled its leadership after "top-down, somewhat heroic visions of the school leader as 'The Man in the Principal's Office'" (p. 11).

Likewise, Copland (2008) recognized the myth that, despite the increased activity of teacher leaders, still lingers in America: "If you find the right persons to fill the formal roles at the top of the educational hierarchy, then there will be no more woes for schools" (p. 375). He considers this statement a myth because, as he detailed, the history of school reform shows that widespread leadership is more effective than top-down leadership.

Contemporary school leaders simply cannot do it all alone (Danielson, 2007); therefore, they have to share their power with teachers by building a more collaborative, democratic environment (Beachum & Dentith, 2004). As these new understandings of organizational development emerged, so did modern roles for teacher leaders. What follows is a discussion of the ways in which both formal and informal teacher leadership materialized as a result of emergent theories on structural change in organizations.

2.3.1.1 The Emergence of Formal Teacher Leaders

By the 1960's, administrators acknowledged that they could not operate schools without the assistance of teachers (Jackson, 1968). McGregor's (1960) organizational theory on human motivation provided a foundation for formal teacher leadership, and administrators' promotion of teachers to middle management positions. According to McGregor Theory X leaders do not trust their employees because they view all human beings as lazy and devious. Therefore, Theory X leaders control tightly and supervise closely, all the while centralizing their authority and providing little opportunity for their employees to share in the development of the organization. In contrast, Theory Y leaders perceive people as honest, industrious, and responsible. They delegate authority and share responsibility to enable collaboration in organizational decision making. Theory Y suggests that leaders' practices can transform an organization by inspiring followers to commit to a greater, shared purpose. In regard to teacher leadership, it has been proven that administrators' encouragement of teachers to act as leaders has resulted in sustained school improvement (York-Barr & Duke, 2004).

Eighteen years later, Burns (1978) built upon McGregor's (1960) concept to suggest the theory of transformational leadership, but Bass (1987) extended the theory into the context of education. Initially, transformational leadership was believed to be inherent to a person's ability to inspire others to look beyond their self-interests and focus on the organization collectively. When teachers put aside their own agendas and take risks by extending themselves beyond their classrooms, they proceed as leaders who wish to transform their organizations as a whole.

Transformational leaders collaborate with colleagues. Sergiovanni (1984) argued that leadership itself stems from the culture of an organization which has much to do with the leader's ability to work with many others. He posited a shift in thought: Leadership is not a collection of

management techniques; instead, it is a set of norms and beliefs to which members of effective organizations give their allegiance. Sergiovanni's ideas provided the theoretical underpinnings for the concept of informal teacher leadership, discussed next.

2.3.1.2 The Emergence of Informal Teacher Leaders

Sergiovanni's (1984) arguments were central to the theory of distributed leadership, initially discussed by Elmore (2000) and Gronn (2000). The notion of distributed leadership prompted the emergence of informal teacher leadership. To Elmore, distributed leadership is rooted in mutual dependence and reciprocity of accountability and capacity, with instructional practice at the center. He pushed for educators to relocate authority and responsibility for improving teaching and learning to all those connected to schools, and not just to those at the top of the administrative hierarchies. The vertical hierarchy in organizations (like schools) is changing so that it is becoming more of a horizontal information sharing network in which organizational fluidity allows for more collective decision-making (Task Force on Teacher Leadership, 2001). As Barth (2001) commented, "…when teachers take on leadership roles beyond the classroom their schools can become more democratic than dictatorial, and everyone benefits" (p. 444).

Lambert (2003) argued for school leaders to stop examining leadership as a phenomenon that lies within an individual person and start considering how different forms of leadership might look. Parish and Frank (1996) also challenged schools to "change the pictures of schools and classrooms in the minds of teachers and principals" by tinkering with the traditional, vertical organizational structure of schooling. For example, school leaders may want to think about using a more horizontal approach to leadership – one that disperses leadership responsibilities among various stakeholders. Muijs and Harris (2007) explained that although the "great man" theory of

leadership still prevails in much of Western society, the idea of distributed leadership – a more horizontal approach to leadership – consistently is being deemed effective in schools.

Spillane, Halverson, and Diamond (2001), who first applied Elmore's (2000) theory of distributed leadership to school organizations, assisted educators in becoming more familiar with the concept. They explained that in schools where distributed leadership occurs, "school leadership is best understood as distributed practice, stretched over the school's social and situational contexts" (p. 23).

Gronn (2000) suggested that distributed leadership implies a blurring between the boundaries of followers and leaders. This conjunction constitutes an unusual power relationship within the school because the leader is "decentered" in a school in which distributed leadership is practiced. Gronn viewed distributed leadership as collective, and stated, "Leadership is present in the flow of activities in which a set of organization members find themselves enmeshed" (p. 331).

Within schools, teachers are the organizational members who can work alongside formal leaders to drive school districts forward. After all, one administrator cannot serve as the instructional leader for the entire school without substantial participation of others (Danielson, 2007; Elmore, 2000). Thus, distributed leadership and teacher leadership conceptually are linked closely. Muijs and Harris (2007) noted that this is why the idea of teacher leadership is gaining more attention. They explained that although distributed leadership might encompass the roles of formal school leaders, the theory applies to the roles of informal teacher leaders as well. Essentially, teacher leadership – especially informal teacher leadership – is the key to school improvement (Harris, 2005).

As changes in organizational structure occurred, schools were challenged to improve their programs; each event influenced the other. What follows is a discussion of recent national school

reform initiatives that have resulted in the strengthening of formal teacher leadership roles and the emergence of newer, informal ones.

2.3.2 Recent National School Reform Initiatives that Have Influenced the Emergence of Teacher Leaders

The focus on the need for national school reform dates back to the 1980's (Lashway, 1998) when reports like *A Nation at Risk* (1983) exposed problems in America's schools. As early as 1983, Peterson and Cooke perceived teachers as the best resources for improvement and change. They noticed that school reform often was based upon aggressive, expensive, and untested public policy driven by bureaucrats and those at the apex of the education hierarchy. Peterson and Cooke suggested that something must be wrong with such reform efforts because public school fundamentally had been unchanged since its origin. They explained that this is because reform has to reach the classroom teacher, and it usually does not extend beyond the bureaucratic level. Many schools, for example, use school improvement strategies that target everything but what teachers do in their classrooms. If this is the case, then teacher-to-teacher interaction is lacking; thus, teacher leadership is critical for change to occur (Pounder, 2006).

Later during the 1980's, Howey (1988) cited *The National Defense Act of 1987*, which targeted problems like low student achievement, and the need for the creation of dozens of new positions for local school districts. Although these interventions allowed teachers to gain additional professional development, most change efforts were ineffective because teachers' stagnant roles did not permit them to assume leadership responsibilities since they were not part of the administrative bureaucracy.

During the next decade, the literature of the 1990's identified the *No Child Left Behind Act* (NCLB) as the impetus for teacher leadership. Some researchers claimed that teacher leadership as a professional movement resulted from a focus on increasing the achievement of every student as initiated by NCLB and other federal mandates that require standardized testing (Lieberman & Miller, 2005; York-Barr & Duke, 2004).

To describe in more concrete terms the ways in which national school reform initiatives have influenced the emergence of teacher leaders, researchers have organized reform movements into waves. Table 13 illustrates the past, current, and future waves of national school reform efforts that structured and will continue to shape teacher leadership.

Table 13 National School Reform Efforts Influencing Teacher Leadership

Time Period	Wave	Reform Efforts	Effects Upon Teacher Leadership Activity
1980's	1	Coherent structuring of schools Standardized curricula Academic rigor	Weakening of administrative bureaucracies because teachers became upset with the increased standardization of their practice; this resulted in the inclusion of more stakeholders in decision making; teacher leaders act as department heads
Late 1980's to early 1990's	2	Decentralization of decision making Enhancement of local autonomy and a accountability Emphasis on instruction and learning	New roles begin to emerge for teacher leaders; most roles are formal so that teacher leaders act as extensions of administrators to augment accountability; teacher leaders act as department heads and curriculum specialists
Late 1990's to 2000's	3	Integration of teaching, leading, and learning Focus on professionalism and collegiality	Teacher leadership comprises a vast array of individual behaviors and characteristics rather than formalized or positional management duties; teacher leaders assume roles based upon their individual strengths and interests
Future	4	Focus on teachers' transformational qualities in the classroom that may indicate their competency as teacher leaders Increased professional development for teachers wishing to assume more informal role	Teacher leadership becomes rooted in transformational leadership as demonstrated by teachers who exercise transformational leadership with their students; teacher leaders now receive professional development to learn how to affect change; more teacher leaders emerge as a result of increased training

Specifically, two waves of school reform began in the 1980's (Smylie & Denny, 1990). The first wave involved the coherent structuring of schools through standardized curricula and academic rigor. Those who criticized the first reform movement argued that schools were too dynamic to be forced into a uniformed bureaucracy, and that something as private and personal as teaching cannot be standardized. Therefore, it was surmised that change needed to be localized to involve stakeholders as decision makers in lieu of as targets of bureaucratic practices. Smylie and Denny (1990) identified a second wave of school reform – the (then) current educational reform movement. They explained:

> This wave has yielded a host of new initiatives that seek to restructure schools, redefine the roles and responsibilities of teachers and administrators, decentralize decision making, and enhance local autonomy and accountability. On the crest of this wave is the development of new leadership roles for teachers. (p. 238)

What Smylie and Denny (1990) regarded as the second wave of school reform, Silva et al. (2000) considered the first wave of teacher leadership – the teacher leader as the organizational leader who acted as an extension of the administration in order to augment accountability. While the teacher leaders during the first wave performed as department heads, teacher leaders during the second phase worked as curriculum specialists as more emphasis was placed upon the instructional dimension of leadership. Nevertheless, teacher leadership during the second wave still remained formal with the creation of new managerial positions for teacher leaders.

Truly to restructure schools, Parish and Frank (1996) suggested that educators establish a culture of trust through team building and collaboration. They contended that teacher leaders can establish this kind of culture needed to transform schools. The current and third wave of teacher leadership (Pounder, 2006) encompasses the cooperation and shared decision making necessary

58

for sustained school reform (Parish & Frank, 1996). Silva et al. (2000) described the third wave as an integration of teaching, leading, and learning, grounded in professionalism and collegiality. Pounder, however, commented that the third wave of teacher leadership is difficult to articulate due to the abstract nature of teacher leaders' roles. He explained that the concept is vague because the third wave of teacher leadership comprises a vast array of individual behaviors and characteristics rather than formalized or positional management duties.

Recognition of teachers' individual behaviors and characteristics may result in what Pounder (2006) deemed a potential fourth wave conceptualization of teacher leadership. Once teachers learn how to lead by engaging in professional development, Pounder suggested examining teacher leaders' qualities in the classroom in conjunction with their teacher leadership styles. Pounder perceived one possible explanation for a connection between the two teacher behaviors: Teacher leaders display their learned transformational leadership characteristics in the classroom, and this may give rise to excellent classroom performance. An examination of teacher leaders' classroom behaviors using transformational leadership as a frame of reference could explain why excellent teachers tend to become teacher leaders (Snell & Swanson, 2000) and conversely, why teacher leaders are generally excellent teachers. According to Pounder, if this is found to be the case, then it might indicate a possible avenue for the development of a fourth wave of teacher leadership.

Brought about by the need for school reform, the concept of teacher leadership has grown significantly (Lieberman & Miller, 2005). The research literature on teacher leadership and school improvement now is filled with theoretical underpinnings for teacher leader programs (Rogus, 1988), thus illustrating that the subject of teacher leadership and professional development is gaining more attention. For example, Hannay and Denby (1994) discovered that formal teacher

59

leaders were not very effective as facilitators of change because of their lack of knowledge and skill on the subject of effecting change.

Unlike Hannay and Denby (1994) who supported the idea of teacher leaders receiving professional development once they assume leadership responsibilities, Gehrke (1991) called for a more systematic approach to the development of prerequisite skills necessary for teachers to act as effective leaders. According to Pounder (2006), schools that wish to encourage teacher leadership need to provide teachers with professional development on the subject of leadership. Even if teachers choose not to become leaders, Gehrke believed these skills may enhance their performance in the classroom, which ultimately will benefit students.

Professional development programs that provide teacher leaders or pre-service teachers with skills necessary for leadership are among the most recent school reform initiatives instituted. Gehrke (1991) described beginning teacher assistance programs that match a veteran teacher with a new teacher allowing for veteran teachers to mentor new hires. Other programs stress school-centered decision making, also called site-based management, which requires teachers to be involved in making decisions about structures and programs in their schools. Schools also have joined with higher education institutions for the purposes of creating professional development schools to serve as the locus for teacher preparation, career long professional development, and school innovation and reform.

Hambright (2005) participated in and evaluated one such program for assisting teachers in developing the transformational leadership skills essential for school improvement. The model program, titled the Teacher Leader Program (TLP), was based upon current research and data that called for learning, collaboration, and self-accountability. The TLP included much reflection and assessment of the program itself. Coupled with the basics of transformational leadership, the

reflection and assessment helped the program develop a high caliber of professionals. Hambright's research substantiated Gehrke's (1991) assertions that teacher leaders need professional development.

2.3.3 Summary of Recent Changes in Organizational Structure and National School Reform Initiatives that Resulted in the Emergence of Teacher Leaders, and Specifically, Those Who Assume Informal Roles

A number of changes in organizational structure and national school reform initiatives have resulted in the emergence of teacher leaders. Once the demands of public school became too great for administrators to handle on their own, they looked to formal teacher leaders for assistance with managerial tasks (Jackson, 1968).

McGregor's (1960) organizational theory on human motivation provided the impetus for structural change in schools. He contended that leaders who perceive employees as honest, industrious, and responsible inspire them to commit to a greater purpose and transform their organizations. McGregor's ideals prompted Burns (1978) and Bass (1987) to consider how transformational leadership in schools might inspire employees like teacher leaders to share in the success and failure of their organizations.

Reflecting on the theory of transformational leadership, Elmore (2000), Gronn (2000), and Spillane et al. (2001) developed the theory of distributed leadership as it applies to schools. School leaders who distribute their responsibilities recognize the need for both formal and informal teacher leaders to share in the decision making processes and implementation of school reform initiatives.

Specific school reform initiatives that have sparked the emergence of teacher leaders resulted from the publication of *A Nation at Risk* (1983). Once problems in America's schools were exposed in the 1980's, the National Defense Act (1987) called for leaders to target low student achievement. Although formal teacher leadership positions were created, teacher leaders did not receive professional development on how to enact change (Howey, 1988). Hence, their leadership as middle managers within the then prevailing top-down, bureaucratic structure of schools was relatively ineffective.

Regardless, throughout the 1980's and the first major wave of school reform, schools were encouraged to standardize their curricula to promote academic rigor (Smylie & Denny, 1990). Although the first wave of school reform did not transform teacher leadership, the second wave yielded new, informal leadership roles for teachers.

The second wave of school reform lasted throughout the 1990's, when the passage of NCLB forced educators to focus on the achievement of every student (Lieberman & Miller, 2005; York-Barr & Duke, 2004). In order to accomplish this task, administrators needed to distribute responsibilities to teacher leaders eager to improve student achievement.

The third and current wave of informal teacher leadership is difficult to describe because it encompasses individual behaviors and characteristics of informal teacher leaders who assume various, undefined roles (Poutner, 2006). Providing professional development on the subject of teacher leadership might result in an increased number of teachers confident enough to lead (Gehrke, 1991). Additionally, professional development might promote a fourth wave of teacher leadership in which leading, learning, and transformational qualities are fused (Parish & Frank, 1996; Pounder, 2006).

In addition to the recent changes in organizational structure and national reform efforts influencing teacher leadership, a number of school-related factors contribute to the development of teacher leaders. The two most significant factors commonly presented in the literature are discussed in the following section.

2.4   WHAT SCHOOL RELATED FACTORS CONTRIBUTE TO TEACHER LEADERSHIP?

The research literature can be organized according to two factors that contribute to teacher leadership: (a) school culture and (b) administrators' influence. School culture refers to the conditions within schools that influence teacher leadership. Such conditions include the organizational structure of schools, as well as colleagues' relationships with each other (York-Barr & Duke, 2004). School culture also consists of power structures and micro-politics that potentially may have a strong impact on teacher leadership (Acker-Hocevar & Touchton, 1999), and particularly, informal teacher leadership.

Administrators' influence represents the second factor that contributes to teacher leadership. Administrators' actions either can hinder or foster teacher leadership because, due to their positions within school systems, administrators (especially school principals) exercise the greatest power upon teacher leadership (York-Barr & Duke, 2004).

Administrators' relationships with teacher leaders strongly influence a school's culture; hence, the two factors that contribute to teacher leadership are interrelated (Howey, 1988). However, they will be discussed individually.

2.4.1   School Culture as a Contributing Factor

Relationships within a school determine its culture, and the school's culture either supports or hinders teacher leadership. Barth (2002) defined school culture as "the way we do things around here" (p. 6). He asserted that a school's culture has, by far, the largest influence on students' achievement. Barth explained:

> A school's culture is a complex pattern of norms, attitudes, beliefs, behaviors, values, ceremonies, traditions, and myths that are deeply ingrained in the very core of the organization. It is the historically transmitted pattern of meaning that wields astonishing power in shaping what people think and how they act. (p. 7)

Researchers have struggled to learn how school culture impacts teacher leadership and specifically, teachers' willingness to assume leadership responsibilities. Table 14 summarizes major studies illustrating how school culture influences teacher leadership, as well as the types of school cultures that nurture a sense of collegiality necessary for teacher leaders to emerge.

Table 14 Studies of School Culture and Its Effects Upon Teacher Leadership

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Beachum and Dentith	2004	To explore definitions of teacher leadership from the perspective of teacher leaders	Qualitative study of 25 teachers in five urban schools; teachers interviewed and field observations were conducted	School culture and teacher leadership are connected. Teacher leaders emerged in school cultures that supported their growth.
Hargreaves	1994	To study school culture as shaped by teacher leadership, and the types of relationships that manifest in schools	Not reported	The form school culture takes determines the patterns of relationships or associations among teachers. Mosaic school cultures promote teacher leadership.
Acker-Hocevar and Touchton	1999	To discover how school culture influences teachers' collective decision making processes	Qualitative study of six teacher leaders, who were interviewed	Teachers who changed their school's culture were those who actively committed to the decision making processes in their schools.
Kardos et al.	2001	To learn which type of school culture promotes interaction between experienced and new teachers	Interview data were gathered from a purposive sampling of 50 first and second year teachers	New teachers were served best in schools that sustained an integrated culture based upon a sense of shared-responsibility.
Harris	2003	To discover how school culture affects teacher leadership practices in difficult school contexts	Fifty interviews were conducted with principals, teacher leaders, and classroom teachers; documentary and contextual data also were collected	Teacher leaders adopt leadership styles that mirror the state of their schools' development. But, if given the choice, teacher leaders choose to lead in a manner that empowers others.

Table 14 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Muijs and Harris	2007	To learn how teacher leadership manifests itself in schools with differing cultures	Qualitative case study of three schools; respondents were interviewed, and data were analyzed statistically	Teacher leaders emerge in schools with cultures that support collaboration, shared decision making, professional development, accountability, and trust.
Hart	1994	To learn how schools' social environments impact teachers' morale and willingness to act as leaders	Comparative case study of two junior high schools; interviews were conducted, and field notes were gathered	A school's social system, or culture, is shared and determines the success or failure of teacher leadership. Teacher leadership flourishes in schools where collegiality is supported.
Lemlech and Hertzog-Foliart	1992	To examine the culture of schools and ways to support teacher collegiality	Pre-service teachers participated in an "atypical" teacher preparation program; once they learned leadership skills and were hired, their school cultures were judged as to whether they supported teachers as leaders	Teachers' collegiality affects group processes and the achievement of group goals. Studies of collegiality are critical to transform school cultures into those that support teacher leadership activities.
Pechman and King	1993	To determine elements of school culture that facilitate and hider teacher leadership and restructuring efforts	Mixed-methods study of three non-urban and three-urban middle schools	Active teacher leadership promoted faculty cohesiveness and commitment necessary for restructuring schools. Effective teacher leaders were judged by their capacity to build collegial relationships.

Table 14 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Lambert	2005	To identify the types of school cultures that sustain school reform	Principals and teachers that share leadership responsibilities among 15 schools were interviewed	Aspects of school culture that initiate and sustain teacher leadership necessary for school reform include conversation coupled with reflection and inquiry, coaching and mentoring into leadership, networking, and integrating new teachers into the school.

A school's culture is comprised of the negotiated norms of daily work (Barth, 2002). School culture significantly influences teacher engagement, teacher leaders' work, and teachers' relationships with each other (Talbert & McLaughlin, 1994).

School culture includes teachers' relationships with each other, and is considered a strong influence on the success of school reform and the development of teacher leaders (Deal & Peterson, 1998; Fullan, 2001). Beachum and Dentith (2004) recognized a strong connection between school culture (as shaped by administrators), and teacher leadership. They argued, "Teachers who take leadership roles in their schools are successful agents and conduits in promoting cultural change" (p. 283) and making the schools' culture more collaborative. If the school's culture is such that differences in opinion are recognized and valued, then faculty will learn from each other in a collaborative environment (Hoerr, 2004).

Specifically, relationships among colleagues shape school culture, and teacher leaders' ability to promote collegial relationships is critical for the creation of a school culture that

cultivates change. Administrators, teacher leaders, and teachers need to cooperate as equals in order for collegiality and openness to become cultural norms (Smylie, 1992).

A sense of equality among educators matters because, according to Lambert (2002), all teachers have an equal right, a responsibility, and the ability to lead. Barth (2001) also believed this ideal. He stated, "All teachers can lead" (p. 444), and continued to assert that if schools do not believe that all teachers have the capacity to lead, they are going to suffer from self-fulfilling, low expectations as students would if schools adopted the mantra: "Some students can learn." Later, Barth (2006) explained that "the nature of relationships among the adults within a school has a greater influence on the character and quality of that school and on student accomplishment than anything else" (p. 8). Additionally, he purported, "…the relationships among the educators in a school define all relationships within that school's culture" (p. 8).

To understand more thoroughly how school culture contributes to teacher leadership, a number of researchers have studied the types of relationships that manifest in schools (Barth, 2006; Hargreaves, 1994; Kardos et al., 2001). Table 15 summarizes various continua of school cultures based upon researchers' findings.

Table 15 Three Continua of School Cultures

Researcher(s)	Relationship/Culture	Characteristics that Determine School Culture
Barth	Parallel Play	No interaction occurs among teachers because practice is privatized.
	Adversarial	No interaction occurs among teachers because they clearly dislike each other.
	Congenial	Colleagues interact as friends, but not as professionals.
	Collegial	Colleagues interact as professionals, share knowledge, and support each other.
Hargreaves	Individual	No interaction occurs among teachers because practice is privatized.
	Balkanized	Teachers refuse to interact as a team, but gain identity by working in territorial groups.
	Contrived Collegial	Administrators feign teacher empowerment, but no real teacher leadership occurs.
	Collaborative	Teachers are empowered to lead.
	Mosaic	Administrators and teachers cooperate in planning and decision making because they are committed to school improvement.
Kardos et al.	Veteran-Oriented	Concerns and habits of experienced teachers determine professional norms.
	Novice-Oriented	Inexperience, youth, and idealism prevails.
	Integrated	No separate camps of veterans and novices exist, and a sense of collegiality and collaboration prevails.

Barth (2006) labeled four types of relationships among teachers that occur within schools, and determine a school's culture. The first relationship between teachers is one of parallel play that fosters privatization of practice since teachers work alongside one another, yet never interact. The next relationship identified was adversarial whereby teachers keep to themselves professionally, and do not enjoy one another's company. Barth distinguished a congenial third relationship which results in colleagues' personal and friendly behavior. Finally, Barth acknowledged the fourth relationship among teachers – the collegial relationship – as the best for maintaining a culture that sustains school reform. He depicted teachers' collegial relationship as one that encourages conversations about practice, the sharing of "craft knowledge," peer observations, and teachers' support of each other. Building upon his earlier work (Barth, 2001), Barth perceived learning and teaching as inseparable, for teacher expertise becomes contagious through collaboration, and practice may become more deprivatized to create a professional work environment.

Like Barth (2006), Hargreaves (1994) studied school culture as shaped by teacher leadership and the types of relationships that manifest in schools. His typology of teacher culture provided the conceptual framework for subsequent research (Acker-Hocevar & Touchton, 1999). Hargreaves defined school culture as encompassing the attitudes, values, beliefs, and habits that are shared within a particular group or among teachers within the community. According to Hargreaves, the form the culture takes determines the patterns of relationships or associations among teachers. These associations may be: (a) individual so that teachers stay in their respective classrooms and rarely interact; (b) collaborative maintained by teachers' sense of empowerment; (c) collegial, but contrived, because administrators truly never give teachers the opportunity to lead despite the fact that they feign interest in teachers' opinions and advice;

70

(d) balkanized when teachers refuse to act as a team so that they gain power and identity by working in territorial groups; and (e) mosaic marked by all teachers' commitment to school improvement, and willingness to assume informal leadership responsibilities, cooperate in planning, join in decision making, and maintain a flexible, responsive culture in which the boundaries between administrators and teachers are blurred.

Kardos, Moore Johnson, Peske, Kauffman, and Liu (2001) also observed the blurring of boundaries in school buildings where equality was the norm. In their study of new teachers' experiences as influenced by the assistance of veteran teachers who act as informal teacher leaders, Kardos et al. identified three types of professional cultures that schools cultivate. The first, called veteran-oriented professional culture, is dominated by the concerns and habits of experienced teachers who determine professional interactions that range from friendly to cold. In veteran-oriented cultures, teachers work independently and rarely interact with new teachers. The second type of professional culture, according to Kardos et al., is novice-oriented. These environments are driven by inexperience, youth, and idealism as high proportions of new teachers engage in ongoing, intense professional interaction with one another. Although the interaction among new teachers proves positive, they basically remain uninformed by expertise from veterans, who continue to keep to themselves and offer no professional guidance. Finally, Kardos et al. named integrated professional cultures as the third type of school culture in which new teachers find themselves enmeshed. They discovered that new teachers were best served in these settings, where veteran colleagues acted as informal teacher leaders by providing sustained support through mentoring and frequent deliberations about curriculum and instruction. Since no separate camps of veterans and novices existed, responsibility was shared by all teachers who continually acted as learners committed to their professional development. Hence, Kardos et al.

determined that the school cultures most conducive to new teachers' success were those in which informal teacher leaders took the responsibility of fostering collegial relationships with novices. Like Smylie (1992), Kardos et al. learned that when all teachers acted as equals, a successful school culture flourished.

To learn how teacher leaders cooperate as equals to use their agency to make decisions collaboratively in order to influence their schools' cultures, Acker-Hocevar and Touchton (1999) interviewed six teacher leaders charged with the task of initiating reform in Florida. Teacher leaders responded to questions regarding how they might exercise their agency, or influence, in their practice to make decisions within the culture and power structures of their schools. From their research, Acker-Hocevar and Touchton found that teacher leaders who impacted the system and made changes were involved and actively committed to assisting with the decision making processes in their schools. Conversely, in schools where there was little or no impact and consequently, silent, withdrawn teachers, no change occurred. Acker-Hocevar and Touchton discovered that teacher leaders who exert influence understand the "big picture" because they can envision the broad impact of their work. Those teacher leaders who wield the most agency are treated with the most respect by their colleagues and administrators, who therefore are willing to work with them as equals.

The types of relationships apparent in schools determine school culture, and school culture either supports or hinders teacher leadership. In addition to examining relationships among colleagues, Harris (2003) studied teacher leaders' practices as determined by their schools cultures, and particularly how teacher leaders function in difficult school contexts. She established that teacher leaders working in English schools with low student achievement adopt leadership styles that reflect their schools' cultures. For example, in schools with autocratic

cultures, teacher leaders assumed comparable leadership styles; however, even those teacher leaders acknowledged that a domineering leadership style was not effective in regard to sustaining school improvement. Along with the teacher leaders who espoused a collaborative leadership style that reflected the culture of distributed leadership that prevailed in their schools, the autocratic teacher leaders explained that if given the choice, they would have empowered their colleagues and shared leadership responsibilities.

In their qualitative study of three schools (called Schools A, B, and C), Muijs and Harris (2007) built upon Harris's (2003) earlier work and sought to illuminate the different ways in which teacher leadership manifests in schools with different types of cultures. Of those studied, School A represented the culture in which teachers shared informal leadership responsibilities. In School A: (a) teachers were given time to assume leadership responsibilities, (b) administrators were visible and available to serve on teams of teachers, yet they did not lead, (c) staff members were involved in decision making, (d) pupils assumed leadership roles, (e) staff members received professional development on leadership related topics, (f) the school was involved with an external program organized by a higher education institution, (g) a sense of collective commitment and trust prevailed, (h) staff engaged in team building activities, (i) cross subject teams were established, (j) all staff were given leadership responsibilities, and (k) teachers were held accountable for improving student achievement.

Harris (2003) and Muijs and Harris (2007) understood that school culture either strengthens or weakens the emergence of teacher leaders. Similarly, Hart (1994) learned that school culture – namely schools' social environments – strongly impacts teachers' morale and willingness to take on the extra role responsibilities associated with teacher leadership. Using role theory as the theoretical framework for her research, Hart compared two junior high schools

73

involved in the reform process. Through the gathering of systematic field notes and the conducting of both structured and unstructured interviews, Hart ascertained that a school's social system, or culture, is shared and determines the success or failure of teacher leadership. For example, in schools where collegial relationships were not supported, teacher leaders remained confused about their responsibilities. This uncertainty caused tensions between teacher leaders and their colleagues. Particularly, one teacher leader's supervision of new teachers became a source of conflict between colleagues who were not sure if the teacher leader still was "one of them" or instead, joined the administrative team. In such instances, teacher leaders' morale declined as they had difficulty articulating their professional identities or self-concepts. Hence, Hart resolved that no matter how carefully teacher leaders' roles are planned or integrated, school culture determines the nature of teacher leadership.

To understand how school culture supports teacher leadership, Lemlech and Hertzog-Foliart (1992) examined cultural milieu in regard to Lieberman's and Miller's (1990) five elements as essential to restructured schools. They, too, discerned that a culture of teacher collegiality affects group processes and goals. This being the case, Lemlech and Hertzog-Foliart urged more researchers to study collegial school cultures because such studies may be the key to transforming schools into "more productive and socially responsive environments" (p. 3).

Taking the advice of Lemlech and Hertzog-Foliart (1992), Pechman and King (1993) observed the functioning of six schools – three urban and three non-urban – to verify aspects of school culture that facilitate restructuring efforts and teacher leadership. They learned that active teacher leadership promoted faculty cohesiveness and commitment necessary for restructuring schools. In terms of their capacity to build relationships with colleagues, Pechman and King explained, "Effective teacher leaders were described (by teachers) as 'nonjudgmental, well

74

organized, and proactive' as they communicated easily with colleagues and supervisors" (p. 22). The teacher leaders who successfully helped to initiate reform were willing to share responsibilities, yet promptly complete tasks they chose to undertake. They also were candid about their points of view, yet they were not disrespectful to colleagues or supervisors. They shifted between roles easily, and were careful to redefine their roles and responsibilities as dictated by situations that arose. Basically, Pechman and King uncovered that teacher leadership and school culture affect one another.

Knowing the impact of school culture on teacher leadership, Lambert (2005) investigated ways to sustain high quality school reform once it is achieved. She and her team visited 15 "high capacity" schools that shared leadership among them. Principals and teachers were interviewed, and the team identified patterns, made inferences, and drew conclusions based upon analysis of data regarding high leadership capacity and the elements of school culture that promote it. Lambert noted that the actions that foster teacher leadership and a school culture that nurtures it include: (a) professional conversation coupled with reflection and inquiry, (b) the coaching and mentoring of potential teacher leaders into leadership roles, and (c) networking so that all teachers see their roles in the broader context of school reform.

All literature describing how school culture and teacher leadership impact each other reports researchers' salient finding: Teacher leadership occurs in schools with collegial (Barth, 2006) or mosaic school cultures (Hargreaves, 1994) in which all staff members – experienced and new – cooperate as equals to sustain student achievement (Kardos et al., 2001; Lambert, 2002). School cultures where teacher leaders flourish are those in which boundaries are blurred so that administrators, teacher leaders, veteran teachers, and new teachers cooperate as equals to maintain collegial relationships. In such schools, teaching and learning are inseparable (Barth,

2006). Teacher leaders serve as role models to their colleagues by demonstrating subject area and pedagogical expertise. Where these activities take place, school culture promotes teacher leadership, which, in turn, reinforces school culture.

2.4.2   Administrators' Influence as a Contributing Factor

In addition to school culture's influence on teacher leadership, administrators' actions determine whether teacher leadership – especially informal teacher leadership – transpires. This is because administrators' leadership styles set the tone for the overall cultures of their schools. School principals either can reinforce or weaken informal teacher leadership, and teacher leaders seldom are effective in their roles without the support and encouragement of their administrators (Birky et al., 2006).

According to Slater (2008), enlightened school leaders understand that a collaborative working relationship between themselves and teachers is essential to improve teacher professionalism, morale, and retention, as well as enhance learning and teaching. Teachers have a natural desire to contribute (Danielson, 2007), and the behavior of school leaders either can unleash or squelch these tendencies. Barth (2001) identified many ways in which administrators might sustain informal teacher leadership. To strengthen informal teacher leadership in schools, principals can: (a) expect teachers to lead, (b) relinquish some of their authority and control to informal teacher leaders, (c) trust informal teacher leaders, (d) empower informal teacher leaders, (e) include informal teacher leaders to form a collaborative culture, (f) protect informal teacher leaders, (g) recognize informal teacher leaders, (h) share responsibility for failure, and (i) give credit for success.

76

Although Barth (2001) provides a comprehensive list of how principals can encourage informal teacher leadership, much of the information he presents is abstract. A number of other researchers have conducted studies to determine more concrete ways in which principals might promote teacher leadership. Table 16 summarizes major studies illustrating how administrators influence teacher leadership, and Figure 4 shows those administrative actions that support teacher leadership discussed in the writing.

Table 16 Studies of Administrators' Influence Upon Teacher Leadership

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Slater	2008	To study how administrators either can support or hinder teacher leadership	Focus groups of stakeholders were interviewed.	Schools leaders need to understand the importance of developing a collaborative working relationship with teachers and teacher leaders.
Hart	1994	To learn how schools' social environments impact teachers' attitudes and morale	Comparative case study of two junior high schools; interviews were conducted, field notes were gathered, and document artifacts were examined	Little change in schools occurs without the support of principals. Informal teacher leaders will respond to the ways in which their administrators mesh with their schools' cultures.
Johnson and Donaldson	2007	To prove the importance of administrators defining informal teacher leaders' roles as a means of overcoming obstacles for creating a school culture in which leadership is distributed	Second stage teachers in 20 schools were interviewed about their assumption of informal leadership responsibilities	To reap the benefits of teacher leadership, school administrators need to provide formal support structures and build leadership roles into the cultures of their schools.
Olson	2005	To investigate how informal teacher leaders emerge	Ten teachers with five or more years of experience joined an 18-month long leadership institute; Olson acted as a participant-observer; teachers and supervisors were interviewed and observed	Teachers who are self-reflective and passionate about education expand their leadership capacity by engaging in professional development "Quiet" teachers have the potential to lead if given training.

Table 16 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Whitaker	1995	To determine how principals might identify informal teacher leaders	On-site visits and interview with principals and teachers of four schools identified as having a culture conducive to the growth of informal teacher leaders	Effective principals always were able to identify their informal teacher leaders and distribute their leadership responsibility.
Zimpher	1988	To examine Ohio's reform initiatives that informed the need for teacher leadership programs	Four teacher leadership related programs were studied	Teacher leaders – especially informal teacher leaders – need ongoing professional development.
Peckover et al.	2006	To discover how participation in opportunities for sustained action research, collaborative learning, and dialogue with a sustained community of inquirers impacts reciprocity in teacher thinking and teacher leadership	Tracking of teachers' thinking over a two-year professional development initiative grounded in constructivist principals of teacher leadership	If professional development aligns with constructivist theory, then meaningful development in teachers' thinking occurs due to sustained levels of thoughtful interaction around problems of significance relative to teachers' respective schools.
Muijs and Harris	2007	To illuminate the different ways in which teacher leadership manifests itself in schools	Qualitative study of three schools; interviews were conducted, and findings were analyzed statistically	Teacher leadership is supported when administrators give teachers time to assume leadership responsibilities, remain visible, involve teachers in decision making, and provide professional development. In general, administrators have a difficult time relinquishing their responsibilities to teacher leaders.

Assessing School Culture

Shaping Patterns of Teacher Interaction

Defining Abstract or Informal Roles

Expecting Teachers to Lead

Principals Support Teacher Leaders

Providing Prof. Develop-ment

Identifying Potential Teacher Leaders

Supporting Emergence of Teacher Leaders
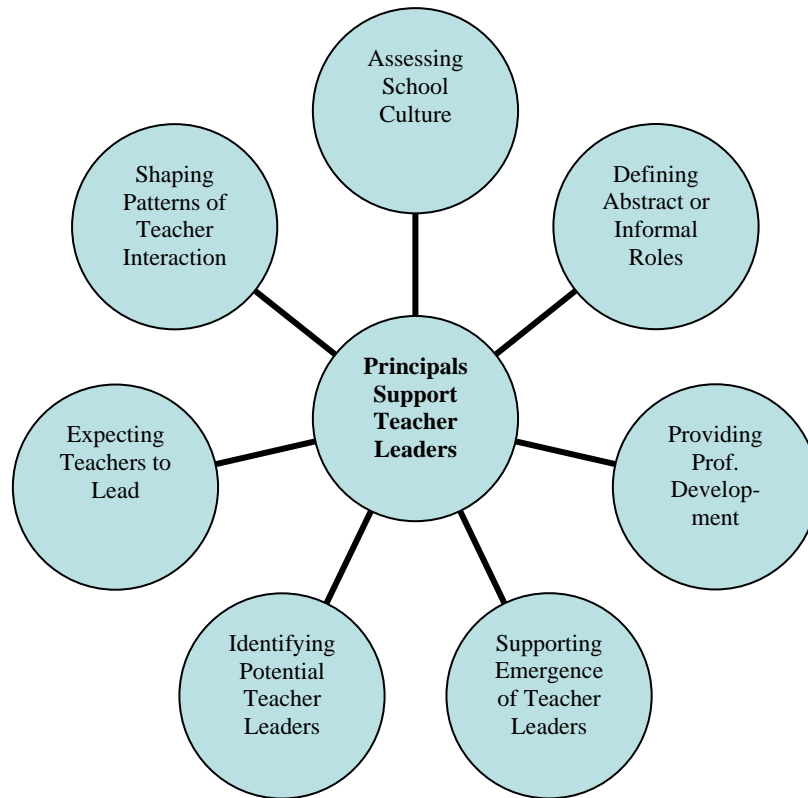
Figure 4 Administrators' Actions that Support Teacher Leadership

2.4.2.1 Assessing School Culture

Administrators who desire to promote teacher leadership first need to assess their schools' cultures to ascertain whether or not it encourages the emergence of teacher leaders. If administrators discover that their schools do not support teacher leadership, then they may wish to initiate the changes necessary for altering the culture of their schools. Barth (2002) argued that a principal's most difficult task is to change a school's culture because all schools' cultures are incredibly resistant to change.

In this time of accountability, administrators have a responsibility to initiate and sustain school improvement (Acker-Hocevar & Touchton, 1999). Thus, administrators need to establish a school culture that promotes student achievement and teacher leadership critical for lasting school reform. Since changing a school's culture cannot be the effort of one person (Elmore, 2000), Barth explained that principals, as instructional leaders, must invite others to join in the reform process, take continual inventory of routine practices, and reflect upon the way things are done in their schools. Moller et al. (2001) declared: "Teacher and administrator relationships are key to improving student learning in schools. Principals who recognize that teachers can assume leadership roles formerly reserved for administrators unleash a powerful resource for the school" (p. 3). To transform a school's environment into one where leadership is distributed, principals can develop and maintain a collaborative culture by encouraging teacher leadership (Hambright, 2005).

2.4.2.2 Helping Teacher Leaders Define Their Abstract, Informal Roles

To encourage and support the emergence of teacher leaders, principals can welcome teachers' assistance and help them move into informal leadership positions by defining teacher leadership

and the parameters of teacher leaders' roles (Buckner & MccDowelle, 2000). The first step to becoming a teacher leader is articulating a vision (Barth, 2001; Phelps, 2008), but, due to uncertainty about their roles or their administrators' support of their work, informal teacher leaders may not know how to bring their visions to the forefront. It has been discovered that teachers hesitate to assume informal leadership responsibilities if leadership roles are not clearly defined by their administrators (Hart, 1994). According to Hart (1994), "Principals should not underestimate the need for their diligent, supportive, visible, and frequent reinforcement of the real power of teacher leaders, nor should they ignore the social-emotional adjustments in professional self-concept that leadership opportunities bring with them" (p. 495).

Teacher leaders' "social-emotional adjustments in professional self-concept" to which Hart (1994) refers includes a keen understanding of their informal, and consequently more abstract, roles. If informal teacher leaders understand their roles, then they are more likely to uphold a strong professional identity (Lashway, 1998).

However, principals still face this issue: Schools are designed as top-down bureaucracies; this directly contrasts with the rhetoric of teacher leadership. In reality, the accountability of the system rests with the administrators; however, significant change cannot occur without teacher involvement (Lashway, 1998). To deal with this paradox, principals need to sort through the ambiguities of teacher leaders' roles, decide how they might wish to distribute their leadership, and determine which responsibilities to delegate to teacher leaders. Helping informal teacher leaders maintain a "strong sense of self" (Lambert, 2003) and confidence that derives from understanding their roles is critical for sustained school improvement.

Johnson and Donaldson (2007) revealed the importance of administrators defining informal teacher leaders' roles as a means of overcoming obstacles for creating a school culture

where leadership is distributed. Second stage teachers- those with four to 10 years of service – were interviewed about their assumption of informal leadership responsibilities. Despite their attempt at leadership in 20 schools where classroom boundaries yet were reinforced and professional cultures that discouraged informal teacher leadership existed, those interviewed still acted as informal leaders due to increased feelings of competence and confidence in their work. Because, however, the eager informal teacher leaders did not impact change as they intended, Johnson and Donaldson suggested that to reap the full benefits of teacher leadership, school administrators need to provide formal support structures and build leadership roles into the cultures of their schools.

2.4.2.3 Supporting the Emergence of Informal Teacher Leaders

Instead of helping informal teacher leaders define their roles, principals first may choose to observe which informal teacher leaders emerge spontaneously. Principals can never be sure which issues will spark teacher leadership, and which teachers will concern themselves with certain issues (Lashway, 1998). As teachers begin to articulate their visions of school reform, their administrators can align those with particular visions to certain school improvement tasks or goals. This practice would allow administrators to maximize leadership capacity of teachers, and offer informal leadership opportunities to a variety of teachers (Phelps, 2008). Olson (2005) suggested that principals wait to see which teachers desire to assume leadership roles and in what capacities. She explained that by allowing informal teacher leaders to come forward within different projects or reform initiatives, administrators can strive to develop leaders with commitment to best practices.

2.4.2.4 Identifying Teachers with the Capacity to Lead

Conversely, Whitaker (1995) recommended that principals attempt to identify their informal teacher leaders. He explained that a principal's success depends upon his or her ability to identify key teacher leaders, involve them in decision making processes, and use their expertise in informal ways to move the school district forward. Whitaker studied schools whose principals scored one standard deviation either above or below the group norm on the Audit of Principals' Effectiveness, a nationally-normed assessment of principals' skills. Based upon their cultures, four schools then were identified for the study. On-site visits and interviews were conducted with principals and teachers to determine if effective principals were, indeed, able to identify informal teacher leaders. Whitaker discovered that successful principals not only identify informal teacher leaders as those respected by their peers, but they also seek their advice and ask them to serve as communication stems between supervisors and colleagues. The less effective principals observed were not able to identify their teacher leaders and therefore did not use the organization's structure to help them lead their schools in a positive direction.

2.4.2.5 Providing Professional Development Opportunities

In addition to identifying informal teacher leaders and assisting with the defining of their roles, administrators also can support informal teacher leaders by engaging them in ongoing professional development so that they might describe their own roles (Harris, 2003; Zimpher, 1988). Whereas formal teacher leaders usually receive professional development (Danielson, 2007), informal teacher leaders frequently design their own roles as dictated by the responsibilities they assume. The difficulty in defining teacher leaders' roles may stem from the general lack of differentiated roles among teachers (Wasley, 1991). Thus, to help informal teacher leaders define their own roles, principals need to offer them professional development on

the study and execution of instructional processes, the interpersonal nature of leadership, and how to provide colleagues with constructive and informed feedback (Zimpher, 1988). Providing teachers with professional development not only helps them learn how to act as informal leaders, but it also conditions them to think like leaders.

For example, Peckover et al. (2006) tracked teachers' thinking over a two year professional development initiative grounded in constructivist principles of teacher leadership. They worked to discern how participation in opportunities for sustained action research, collaborative learning, and dialogue with a sustained community of inquirers impacts reciprocity in teacher thinking within problem spaces related to teacher leadership. Peckover et al. found that if professional development aligns with constructivist theory, then meaningful development in teachers' thinking occurs due to sustained levels of thoughtful interaction around problems of significance relative to teachers' respective schools. Through teacher leadership activity, participants in professional development construct an understanding of themselves as agents of change who contribute to the wellness of the overall organization. Essentially, professional development assists informal teacher leaders in defining their roles and thinking about how their roles impact change.

2.4.2.6 Expecting All Teachers to Lead

Despite the fact that Gabriel (2005) cautioned against mollifying teachers by giving all of them a leadership position, a third way that principals can support informal teacher leadership is by setting the expectation that all teachers can and will become leaders (Blegen & Kennedy, 2000). As explained in Section 2.1, Barth (2001) and Lambert (2002) also supported the notion of all teachers working as informal leaders. In her study of leadership for lasting reform, Lambert (2005) identified a strong belief in equity and the power of democracy as a characteristic shared

by effective principals who sustain high leadership capacity. Additionally, Lambert discovered that those administrators able to sustain school reform possessed the following traits: (a) the ability to develop capacity in informal teacher leaders, colleagues, and the organization; (b) knowledge of the work of teaching and learning; and (c) an understanding of themselves and their values.

In order to maintain teacher leadership by encouraging all teachers to lead, principals surely need to understand their values and beliefs because for most, relinquishing responsibilities to informal teacher leaders proves rather difficult (Muijs & Harris, 2007). In their comparative case study of three schools with different cultures, Muijs and Harris established that in all three schools – even the school with the culture most favorable to the emergence of teacher leaders – administrators were reluctant to delegate some of their responsibilities to teachers. However, in the school where administrators acquiesced despite their hesitance, informal teacher leadership prevailed.

Lashway (1998) argued that increased teacher leadership will require a rethinking of administrators' roles because when teachers lead, they gain power and influence which threatens principals' traditional lines of control. As teachers move from private practice to collaboration, they become part of the power structure, requiring principals to function among equals. Lashway contended that teachers expect more of their administrators as a result of collaboration, which ultimately becomes more important to administrators than control.

Beachum and Dentith (2004) called for administrators to trust informal teacher leaders as their peers, and not to consider them subordinates. They claimed that research has shown that informal teacher leadership may serve as the means for dissolving the dichotomy that yet exists between management and teachers. According to Beachum and Dentith, what can be implied

from the research is that teachers who undertake informal leadership roles promote organizational change by making their school's culture more collaborative.

2.4.2.7 Shaping Patterns of Teacher Interaction

Lastly, administrators may impact informal teacher leadership by shaping patterns of interaction during the early weeks of their new leadership assignments (Hart, 1994). How a principal interacts with subordinates early during his or her assignment sets the stage for "the future influence she might have on their (stakeholders') beliefs and actions" (Hart, 1994, p. 4). When a new leader joins a school, he or she experiences a sort of adult socialization, called organizational socialization, by which he or she learns the professional values and norms of the new context. Simply, organizational socialization requires a new leader to be integrated into the school's social group in order to be validated by others. This validation goes beyond the leader's formal authority. Formal authority can support actions required by policy, but organizational authority can carry a leader's influence and allow him or her to develop relationships with others in the organization so that collaboration and interaction occur. Hart explained that informal teacher leaders will respond to the way in which their administrators mesh with their organization's culture. If principals enter the organization with expectations of collaboration and joint decision making, then teachers will validate them by taking on informal leadership responsibilities that promote cooperation.

Essentially, administrators need to recognize that the establishment of adult-to-adult relationships through effective communication fosters trust and engages informal teacher leaders in organizational practices (Slater, 2008). Administrators who listen actively and reflectively by asking questions for additional clarification gain the trust of their teachers. When teachers trust

their administrators, they eagerly respond to their natural leadership tendencies and impact their schools by engaging themselves as informal leaders (Danielson, 2007).

2.4.3   Summary of Factors that Contribute to Teacher Leadership

Lastly, administrators may impact informal teacher leadership by shaping patterns of interaction during the early weeks of their new leadership assignments (Hart, 1994). How a principal interacts with subordinates early during his or her assignment sets the stage for "the future influence she might have on their (stakeholders') beliefs and actions" (Hart, 1994, p. 4). When a new leader joins a school, he or she experiences a sort of adult socialization, called organizational socialization, by which he or she learns the professional values and norms of the new context. Simply, organizational socialization requires a new leader to be integrated into the school's social group in order to be validated by others. This validation goes beyond the leader's formal authority. Formal authority can support actions required by policy, but organizational authority can carry a leader's influence and allow him or her to develop relationships with others in the organization so that collaboration and interaction occur. Hart explained that informal teacher leaders will respond to the way in which their administrators mesh with their organization's culture. If principals enter the organization with expectations of collaboration and joint decision making, then teachers will validate them by taking on informal leadership responsibilities that promote cooperation.

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their administrators, they eagerly respond to their natural leadership tendencies and impact their schools by engaging themselves as informal leaders (Danielson, 2007).

2.5   WHAT BARRIERS IMPEDE TEACHER LEADERSHIP?

Although both factors contribute to teacher leadership, school culture and administrators also may act as barriers to teacher leadership. However, a number of additional barriers to teacher leadership exist. The barriers discussed in this section of the literature review are summarized below in Figure 5. Major studies identifying barriers to teacher leadership are presented in Table 17.

Unfavorable School Culture; Lack of Principal Support

Lack of Experience and Training

Barriers to Teacher Leadership

Resistant Colleagues

Lack of Time and Financial Incentive
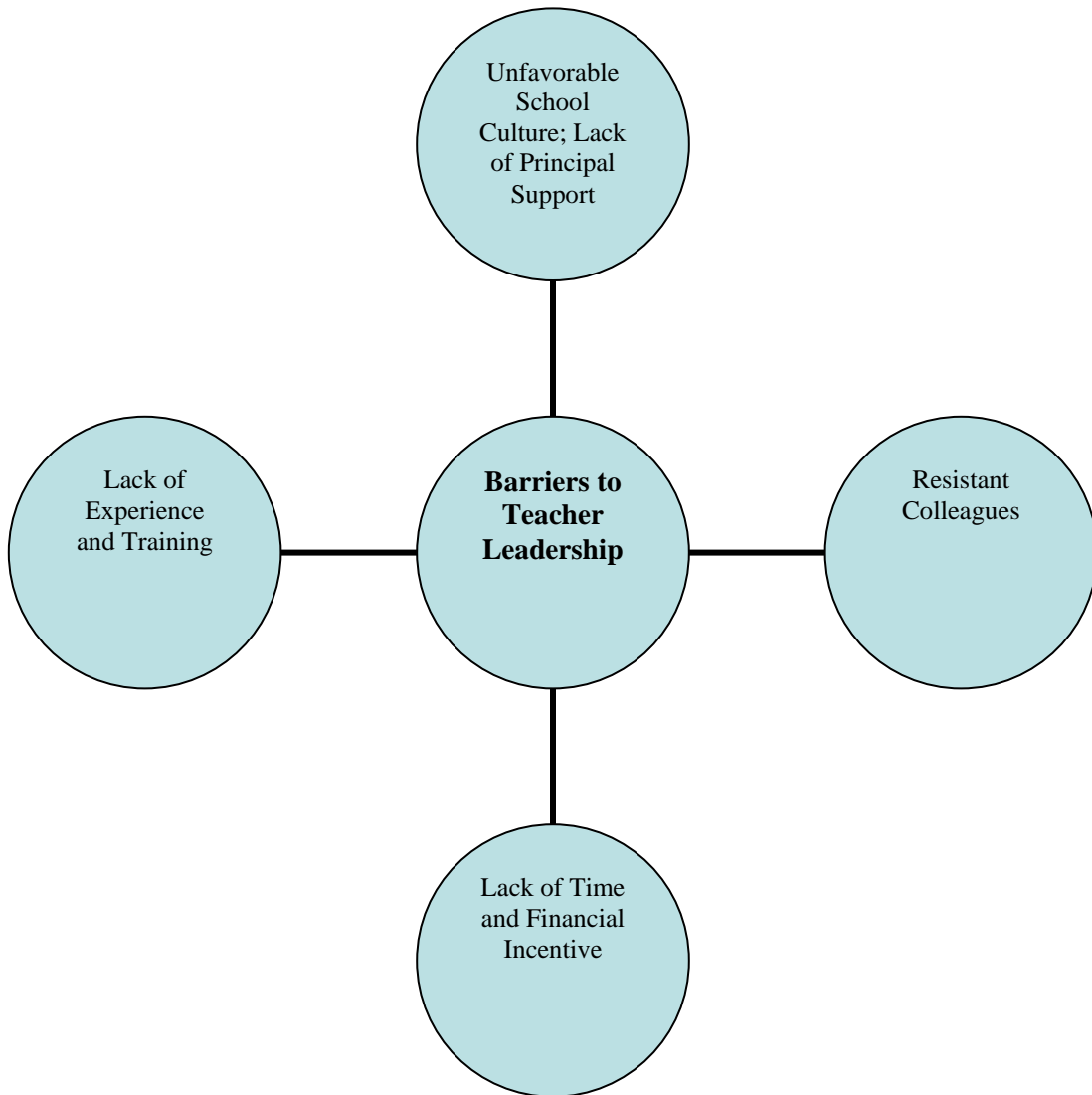
Figure 5 Barriers That Impede Teacher Leadership

Table 17 Studies of Barriers that Impede Teacher Leadership

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Goldstein	2004	To discover how teacher leaders make sense of their supervisory roles	Evaluation of teacher peer assistance and review program	Both teacher leaders and principals first were not in favor of teacher leaders doing evaluations of peers, but principals and teacher leaders soon realized that teacher leaders could evaluate their peers accurately once the hierarchical structure of schools was flattened.
Little	1995	To describe tensions surrounding teacher leaders' evolution	Qualitative study of two high schools engaged in aggressive restructuring	Teacher leaders struggle with the egalitarian culture of their profession.
Lieberman and Friendrich	2007	To study teacher leaders' personal experiences	Qualitative study of teacher leaders who wrote six to ten page vignettes about their personal experiences	Leading involves a number of professional risks for teachers.
Johnson and Donaldson	2007	To investigate ways to reap the full benefits of teacher leadership	Twenty teachers with four to ten years experience and who acted as leaders were interviewed	Teachers are not always dedicated to one another's professional growth or assumption of leadership responsibilities.

Table 17 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Muijs and Harris	2007	To elucidate how teacher leadership manifests itself in schools	Qualitative case study of three schools; respondents were interviewed and data were analyzed statistically	Teachers did not want to assume leadership responsibilities because of a lack of time and financial incentive. Teacher leaders were not confident, and administrators did not want to relinquish responsibilities to them. Colleagues were not supportive of teacher leaders' work.
Leithwood	1997	To inquire about the nature of teacher leadership	Both quantitative and qualitative methods were combined; teachers completed surveys and interviews were conducted	Teacher leadership has a significant influence on schools that is separate from the influence of administrators.
Smylie and Denny	1990	To discover how peers respond to teacher leaders	Thirteen teacher leaders were interviewed and commonalities among their responses were analyzed	Teacher leaders are not certain how their fellow teachers understand their leadership roles. Although some colleagues perceived a benefit from having worked with teacher leaders, others felt that teaching and leading should be kept separate.

2.5.1   School Culture and Administrators as Barriers to Teacher Leadership

Administrators are the fulcrum upon which their school cultures rest. Since school culture influences administrators' behavior which consequently influences school culture (Birky et al., 2006), these two barriers to teacher leadership are discussed concurrently. "Toxic cultures" represent the type of school cultures that present the biggest obstacle to teacher leaders (Deal & Peterson, 1998). According to Deal and Peterson, a "toxic culture" manifests when the school community focuses on negative values so that different groups of stakeholders become fragmented. Only through the resilience of diligent administrators and teacher leaders can a school's collective energy be used to achieve improvement goals in the face of adversity. However, in order to change the cultures of their schools, administrators readily need to distribute their leadership responsibilities (Elmore, 2000; Spillane et al., 2001).

Imperious administrators who refuse to relinquish some of their authority and responsibilities to teacher leaders, or who do not help informal teacher leaders define their roles, act as barriers to teacher leadership (Barth, 2001; Goldstein, 2004; Harris, 2003, 2005; Lashway, 1998; Muijs & Harris, 2007). Administrators may not want to assist teacher leaders because their actions might upset the current hierarchical structure of U.S. public education (Goldstein, 2004). The dominant organizational structure of education, discussed in the following section, presents a second barrier to teacher leadership.

2.5.2   The Organizational Structure of Schools as a Barrier to Teacher Leadership

Borrowed from industry, the current organizational structure of schools places a male (formal) administrative leader in charge of a predominantly female work force. Goldstein argued,

"Education became routinized and standardized with layers of management for supervision" (p. 175). For example, department heads represented one of the ancillary layers of middle management charged with the responsibility of assisting administrators with their managerial tasks (Hannay & Ross, 1999). This process caused a division between administrators and teachers, which proved to be a barrier to teacher leadership.

Little (1988) noted that teachers who serve under the current hierarchical system view professional obligations to one another as intrusive. Many teachers believe the responsibility for their supervision rests hierarchically above them and is therefore is the job of administrators (Goldstein, 2004) – not formal or informal teacher leaders.

A counterveiling vision for education would be one that would flatten the administrative hierarchy into a more distributed leadership model (Elmore, 2000; Goldstein, 2004; Spillane et al., 2001). Research suggests that increasing the leadership responsibility of teachers has positive outcomes for everyone involved in the education process (Hart, 1995). But, the general environment of public education has not been receptive to this change. Goldstein (2004) found that asking teachers to accept responsibility for leading their peers sometimes creates the potential for a struggle between teachers and administrators over "occupational boundaries."

Highlighting "occupational boundaries" (Goldstein, 2004), Donaldson (2007) revealed the intricacies of informal teacher leaders' "in between" position. Since teacher leadership means different things to different people, informal teacher leaders have difficulty naming consistencies among their roles. For this reason, teacher leaders experience pushes and pulls of their complex roles, located somewhere between administrative leadership and classroom instruction. As Donaldson argued, sometimes informal teacher leaders work alongside administrators, but other times, they are invisible to administrators who might not want to distribute leadership

responsibilities. This problem originates from our lack of understanding about leadership itself as many informal teacher leaders cannot find a comfortable niche within their "in between" positions.

2.5.3   Resistant Colleagues as a Barrier to Teacher Leadership

Not only do administrators and the hierarchical structure of schools serve as barriers to teacher leadership, but teacher leaders' colleagues often impede their progress (Ackerman & MacKenzie, 2006; Barth, 2001; Johnson & Donaldson, 2007; Muijs & Harris, 2007). Teacher leadership often is disrupted by colleagues who honor the egalitarian norms of the profession, which frequently suffocate teachers who might wish to lead informally (Barth, 2001; Johnson & Donaldson, 2007). Barth (2001) mentioned that informal teacher leaders' peers either can actively or passively oppose their leadership. For example, classroom teachers may not want to interrupt the flow of what they deem normal activity: "Principals lead, and teachers teach." Or if a school's culture is particularly unfriendly or the school's structure is hierarchical, colleagues actually may try to sabotage or intimidate teachers who wish to lead (Barth, 2001; Muijs & Harris, 2007).

Lieberman and Friedrich (1995) noticed a clash between teacher leaders' natural, collaborative styles and the top-down, bureaucratic norms of schools that resulted in disunity among colleagues. They initiated a set of studies associated with the National Writing Project, including a study during which teachers wrote vignettes about their personal leadership experiences. In writing their vignettes, many teacher leaders confirmed the professional risks involved in leading. For example, teacher leaders who make their practice public might risk being perceived as bragging, or challenging the egalitarian system of schools. Or informal teacher leaders, especially, might be perceived as being odd for their self-motivation to take on extra

responsibilities without pay. And inviting peers to reflect upon their own teaching practices can lead to defensiveness and conflict.

Even claiming identity as a teacher leader was risky for some teacher leaders who were worried that their peers might ostracize them. The narrative writers emphasized that the title of "leader" must be earned – not granted or bestowed – in order to gain any respect. Some leaders shared tales about what happened when they were elevated to more formal, traditional, or authoritarian roles. For example, one leader made unilateral changes in the curriculum and therefore was pushed out of her role by department members (Lieberman & Friedrich, 1995). Similarly, Hart (1994) learned that in the schools she studied, a growing consensus of "animosity and jealousy" toward teacher leaders resulted in the formation of opposition groups that worked actively to undermine teacher leaders.

From their study of 20 second-stage teachers (those with four to ten years of experience) who acted as informal teacher leaders, Johnson and Donaldson (2007) gleaned that the professional, egalitarian norms of teaching, reinforced by colleagues, present a daunting challenge to informal teacher leaders who strive to improve educational practices beyond their own. Interviews suggested that teachers often resist teacher leaders' assistance because they perceive it as an inappropriate intrusion into their personal space. Colleagues also may regard teacher leaders' assistance as an unwarranted claim that the teacher leader is more expert than they, or an unjustified promotion of a novice to a leadership role.

Informal teacher leaders themselves explained that they frequently were rebuffed when they offered to observe colleagues' classrooms or make suggestions about their colleagues' instructional practices. One teacher leader interviewed commented that she clearly is not welcome in a particular colleague's classroom. Other informal teacher leaders told of being criticized by

their peers because their roles granted them unusual privileges or special access to information. For example, a teacher leader commented that several of her peers resented the fact that she could have substitute teachers cover her classes so that she could assume her teacher leader duties (Johnson & Donaldson, 2007).

Johnson and Donaldson (2007) discovered that for teacher leaders, this opposition, which was discouraging or even demoralizing, presented a major barrier to their work. To persist despite peers' "animosity and jealousy" (Hart, 1994), the second-stage teacher leaders generated a plan to deal with their colleagues' resistance, as well as the emotional burden leadership placed upon them. First, they waited to be drafted or invited into peers' classrooms. Next, they tried to work only with the most willing teachers and avoided the teachers who were resistant to change or them. Finally, if teachers requested their assistance, the informal teacher leaders made a point to work side-by-side with their peers so as not to communicate the message that they, as leaders, somehow were superior. By following this plan, the teacher leaders tried to foster joint ownership of the reforms their roles were designed to support. Also, the informal teacher leaders attempted to cast themselves in a more favorable light by acting as sources of support in lieu of supervisors.

Regarding Lieberman's and Friedrich's (1995) study, the factor that appeared to help teacher leaders overcome obstacles was receiving recognition from peers as colleagues who can be trusted and who are willing to assist, not supervise. Peers seemed to respect the informal teacher leaders who continued teaching and who simultaneously enhanced and enriched their own teaching practices. These leaders increased their knowledge and shared it with their peers. They remained empathetic about the challenges their peers faced. Peers regarded these informal teacher leaders as equals – not superiors – and thus were more acceptant of their less defined roles.

Ackerman and MacKenzie (2006) mentioned the "loneliness" of teacher leadership when they explained how colleagues can act as barriers to teacher leadership. They reported that sometimes, an informal teacher leader works solo to ask tough questions, push against the current grain, or discuss the nondiscussables (Barth, 2006). According to Ackerman and MacKenzie, informal teacher leaders' challenges stem from contrived notions of leadership as hierarchical and formal. To flatten an organization's leadership hierarchy, teacher leaders need to play dual roles. First, they need to work both inside and outside their classrooms toward the ideal of a broader collective and collaborative organization. And informal teacher leaders have to stay true to themselves and their visions while remaining humble when interacting with colleagues. As Ackerman and MacKenzie noted, "This teacher (one whom they studied) found that part of leadership is not just voicing beliefs but staying the course and looking for ways to deepen and expand others' understanding of thorny issues" (p. 67).

Ackerman and MacKenzie (2006) advised informal teacher leaders who want to break down the barriers that hinder their ability to work with peers. They cautioned informal teacher leaders against the "bulldozing" of ideas. Teacher leaders who "bulldoze" might value the image of collaboration, but not the actual input of the group that is imperative for true collaboration to occur. Conversely, Ackerman and MacKenzie encouraged leaders to "nudge" colleagues in lieu of "hammer away" at them, or try to force them to adopt visions of school reform in a manner that colleagues would interpret as "rude." "Nudging" colleagues would allow informal teacher leaders to engage their colleagues in the give and take of shared deliberations, which can bring forth new ideas to initiate change.

Ackerman and MacKenzie (2006) also suggested that informal teacher leaders need to understand that when they advocate for their beliefs or for students' needs, colleagues may not

appreciate their actions and perceive their behavior as "rude" or "disloyal." To combat this, teacher leaders need to develop a thorough understanding of their roles and their peers so that they become more at ease with the complexities of leadership.

Gabriel (2005) explained how teacher leaders, in order to function, have to hurdle obstacles created by their peers. He asserted:

…leaders walk a fine line: They are neither teacher nor administrator. They nurture colleagues and teach alongside them, but they also must retain allegiance to their administrators. They lack line authority. Considering how essential teacher leaders are to improving achievement, this is perhaps the most curious aspect of their roles. They are constantly reminded by both administrators and teachers, of all they cannot do – regardless of their potential for positive change, which is often greater than that of all other leaders in a school because of their broad sphere of influence….Teacher leaders possess a semblance of authority but no formal power – only the illusion of power. For example, a department chair cannot complete teacher evaluations. She cannot place a memo or letter in someone's personnel file, nor can she dismiss a teacher. As a result, she must find other ways to motivate, mobilize, and lead teachers. She must rely on intrinsic leadership abilities, knowledge of group dynamics, influence, respect, and leadership by example to boost the productivity of her department. (p. 2)

Gabriel (2005) continued: "There will be those who rise to the challenge (of leadership) and those who attempt to knock them down. Leadership breeds envy" (p. 21). Gabriel expressed amusement when he explained that teacher leaders usually work for nothing more than job satisfaction, which hardly should evoke envy or worse, maliciousness. Simply, some colleagues just do not respect teacher leaders and therefore may militate against them. Some may resent

change just because a particular teacher leader endorses it. If a teacher leader either was promoted from within or chose to assume leadership duties despite the fact that he receives no tangible rewards, some teachers may rail against him for advancing in a career that offers very little advancement. Peers may worry that a teacher leader is poised to initiate change or disrupt their comfortable agendas. Finally, a teacher leader's colleagues may perceive him as a "sellout" or "traitor" closely aligned with administrators.

2.5.4   Lack of Time and Financial Incentives as Barriers to Teacher Leadership

Besides "toxic" school cultures (Deal & Peterson, 1998), bureaucratic administrators, or unsupportive colleagues, a number of pragmatic barriers to informal teacher leadership exist. One such barrier is time (Barth, 2001; Blegen & Kennedy, 2000; Muijs & Harris, 2007; Suranna & Moss, 2000; Wasley, 1991). Many teachers feel they have no time for leadership since the day-to-day demands of their jobs often keep them confined to their classrooms (Muijs & Harris, 2007). Barth (2001) commented on "teachers' full plate" and explained that for some teachers, there are simply not enough hours in the day for them to lead. Rigid schedules (Moller et al., 2001), unrelated instructional tasks, and an overemphasis on high-stakes, standardized testing make it virtually impossible for a teacher to assume leadership responsibilities (Paulu & Winters, 1998). And the time necessary for fulfillment of leadership duties interferes with teachers' personal lives (Leithwood, 1997).

Informal teacher leaders frequently are not paid for the time they give. Muijs and Harris (2007) identified the lack of financial incentive as another barrier to informal teacher leadership. By comparing three schools with different cultures and unearthing barriers to teacher leadership within all of them, Muijs and Harris discovered that many teachers do not want to assume

additional responsibilities without extra pay. This finding substantiates Johnson's and Donaldson's (2007) assertion that school leaders need to support their informal teacher leaders financially if they expect teachers to take on informal leadership responsibilities.

2.5.5 Inexperience as a Barrier to Teacher Leadership

Next, Muijs and Harris (2007) determined that some teachers avoid opportunities for leadership due to a lack of confidence resulting from inexperience – another barrier to informal teacher leadership. Informal teacher leaders' lack of self-assurance may result from an absence of funding and training on the subject of leadership (Leithwood, 1997). When teacher leaders are expected to take on responsibilities beyond their areas of expertise, effectiveness is constrained because they may not feel secure about their roles (Little, 1995).

As Barth (2001) and Danielson (2007) explained, informal teacher leaders usually do not have training on the personal and interpersonal skills required to lead effectively. Although the thought of opening one's doors to peers and possible ridicule is unnerving to some teachers (Buckner & McDowelle, 2000), with appropriate professional development, even anxious teachers can gain the confidence necessary to operate as role models to their colleagues (The Center for Comprehensive School Reform and Improvement, 2005). If, through professional development, teachers realize their moral purpose and that they have a responsibility to lead, then they will acquire the skills necessary to reestablish the moral foundation of teaching and bring about improvements (Fullan, 1993).

Participating in professional development might help informal teacher leaders learn their roles and establish their values (Fullan, 1993), but participation might also help all educators recognize that boundaries between formal and informal leadership should not exist. Harris (2003,

2005) asserted that the fact that schools still rely upon formal distinctions between formal and informal teacher leaders presents a major barrier to the idea of teacher leadership. To Harris (2003), the distinction illustrates that schools continue to function under the premise of social exchange theory. Social exchange theory of leadership is when leaders provide services to a group in exchange for a group's approval or compliance. With this comes the idea that by empowering followers, leaders ultimately increase their own power. This being the case, teacher leadership in this sense is one in which personal growth is facilitated; the teacher leader benefits by gaining power.

As explained above, problems occur when teacher leaders exercise power because, as The Task Force on Teacher Leadership (2001) noted, teacher leadership is not about "power." Hopefully, through professional development, educators will learn that teacher leadership is about contributing to a community of learners in order to improve educational practice (Katzenmeyer & Moller, 2001).

2.5.6   Summary of Barriers to Teacher Leadership

Certainly, informal teacher leaders are up against odds: (a) school cultures that dissuade teacher leadership, (b) professional norms of egalitarianism and isolation, (c) administrators who find it difficult to relinquish responsibility, (d) undefined roles, (e) disapproving colleagues, (f) a lack of time, (g) insufficient funding, and (h) an absence of professional development on the subject. Nevertheless, dedicated, stalwart, nurturant teacher leaders continue striving to sustain school reform and improve student achievement. As explained in Section 2.6.2, more research is needed to understand ways to support informal teacher leaders in their endeavors so that schools improve.

2.6   SUMMARY OF THE LITERATURE ON TEACHER LEADERSHIP

According to the literature, teacher leadership is the key to transforming schools from bureaucratic hierarchies to collaborative environments where leadership is shared (Beachum and Dentith, 2004; Slater, 2008). To assume that school administrators are the sole persons "in charge" is incorrect (Copland 2008). In order to sustain school reform and improve student achievement, formal school leaders need to distribute their leadership responsibilities to teacher leaders who wish to assist in the school reform process (Elmore, 2000; Spillane et al., 2001).

Whereas formal teacher leaders usually serve as department heads (Hannay & Ross, 1999), informal teacher leaders are those teachers who volunteer for new projects, share their expertise, bring fresh ideas to the forefront, and assist their colleagues in carrying out their practice (Leithwood, 1997; Patterson & Patterson, 2004). Unlike formal teacher leaders who usually are chosen or appointed to lead (Martin, 2007), peers recognize informal teacher leaders as those with credibility, expertise, or relationship-building skills (Patterson & Patterson, 2004). Hence, colleagues sometimes respect informal teacher leaders enough to allow them to exercise their expertise as they emerge spontaneously from the teacher ranks (Danielson, 2007). Simply, informal teacher leaders are the "foot soldiers" who move their school districts forward (Whitaker, 1995).

The ability to collaborate with others is a hallmark of informal teacher leadership (Danielson, 2007). Informal teacher leaders need to collaborate with colleagues to affect their attitudes and beliefs about student achievement (Sledge & Morehead, 2006). Because informal teacher leaders maintain no positional authority (Danielson, 2007; Gabriel, 2005), they must foster a sense of collegiality in order to enact change or influence colleagues. Informal teacher leaders cannot use power to start and maintain change, for teacher leadership is not about exploiting

power (Frost & Durrant, 2003). Instead, teacher leadership is about joining with others through networking (Frost & Durrant, 2003), believing in the leadership capacity of all (Barth, 2001; Lambert, 2002), and maintaining a constant focus on student learning (Moller et al., 2001).

Many factors affect informal teacher leadership, but school culture and administrators are among the most influential. As described by Barth (2002):

A school's culture is a complex pattern of norms, attitudes, beliefs, behaviors, values, ceremonies, traditions, and myths that are deeply ingrained in the very core of the organization. It is the historically transmitted pattern of meaning that wields astonishing power in shaping what people think and how they act. (p. 7)

Since all schools' cultures are exceedingly resistant to change (Barth, 2002), teacher leaders who attempt to enact change often unearth various forms of opposition. Veteran-oriented cultures (Kardos et al., 2001) or cultures where individual practice is reinforced by balkanized relationships among teachers (Hargreaves, 1994) naturally dissuade the emergence of teacher leaders, and especially, informal teacher leaders. However, informal teacher leaders can alter such "toxic cultures" (Deal & Peterson, 1998) by struggling to build community through a model of shared leadership (Khourey-Bowers, Dinko, & Hart, 2005).

For the sharing of leadership to occur, administrators need to be willing to surrender some of their responsibilities and authority (Buckner & McDowelle, 2000). They also need to assist informal teacher leaders with defining their roles because as new roles for teacher leaders are created, new definitions and cognitions need to be formed (Goldstein, 2004). Administrators can help informal teacher leaders further by providing them with professional development on the subject of leadership (Peckover et al., 2006), and simply encouraging them to pursue their interests (Buckner & McDowelle, 2000).

104

Even in schools where administrators promote and support informal teacher leadership, a number of barriers exist. First, teachers frequently do not have time to practice leadership (Barth, 2001). Due to rigid schedules and an overemphasis on preparing students for high-stakes, standardized testing, teachers simply do not have time to leave their classrooms (Paulu & Winter, 1998) where they may become encapsulated. Next, informal teacher leaders usually are not supported financially for their services (Muijs & Harris, 2007). Coupled with a general shortage of time, the lack of financial incentives sometimes discourages teachers from taking on leadership roles (Johnson & Donaldson, 2007).

At times, teachers' lack of confidence or experience keeps them from assuming leadership responsibilities (Muijs & Harris, 2007). Administrators can strengthen teachers' confidence by providing them with training on how teacher leaders interact with and offer feedback to peers (Muijs & Harris, 2007; The Center for Comprehensive School Reform and Improvement, 2005). However, a shortage of funding for teacher leadership presents administrators with the difficult task of arranging for inexpensive professional development (Leithwood, 1997). And some administrators may not want informal teacher leaders to improve their leadership practices because confident teacher leaders might usurp power or authority from formal school leaders (Harris, 2003).

Finally, informal teacher leaders' myopic colleagues frequently prove to be an enormous barrier to their leadership practices. Teacher leaders often experience a feeling of "loneliness" (Ackerman & MacKenzie, 2006) as the egalitarian norms of teaching occasionally prevent peers from understanding why informal teacher leaders might want to assume additional responsibilities (Johnson & Donaldson, 2007). Informal teacher leaders' colleagues might become jealous of them (Hart, 1994), for "leadership breeds envy" (Gabriel, 2005, p. 21).

Despite all the barriers, informal teacher leaders continue to assume responsibilities beyond their supervisors' and colleagues' expectations. Because of this phenomenon, researchers have been able to identify a number of implications that inform those interested in school improvement. Implications are discussed in the next section of the literature review.

2.6.1   Implications of the Research on Informal Teacher Leadership

Much can be implied from the research on teacher leadership. First, despite the continua of teacher cultures that exist within schools (Hargreaves, 1994) and the fact that all schools' cultures are resistant to change (Barth, 2001), informal teacher leaders continue to initiate and sustain reform. Their actions illustrate that informal teacher leaders understand the "big picture" – in order to maintain change, obstacles need to be hurdled. The informal teacher leaders who exert the most influence easily can envision the broad impact of their work (Acker-Hocevar & Touchton, 1999).

Next, it can be inferred that the primary element in facilitating school reform is some type of structural change which challenges the current way of doing things – the culture. This usually involves employing some kind of collaboration to construct a culture for building the capacity to create the best possible learning community for both students and professionals (Hannay & Ross, 1999).

To strengthen informal teacher leadership and collaborative relationships, administrators need to empower teachers and create cultures of trust (Glover, Miller, Gambline, Gough, & Johnson, 1999). Teacher leaders' roles are shaped within the context of their schools, and principals remain responsible for nurturing school cultures where distributed leadership thrives

(Hart, 1994). A shared set of values is critical for transforming schools where leadership is distributed. Leaders must "walk the talk," or actively demonstrate their beliefs (Harris, 2003).

Third, the research implies that administrators also must adopt highly creative approaches to handling the implementation of major change. Principals need to invest in their staff to maintain morale and motivation critical for school improvement. Providing professional development sends the message to staff that they are of vital importance (Harris, 2003), and designing roles for informal teacher leaders helps to reculture schools (Copland 2008). Peckover et al. (2006) concluded that through leadership activity and professional development, informal teacher leaders construct an understanding of themselves as agents of change who contribute to the wellness of the overall organization.

Since Glover et al. (1999) discovered that traditional forms of organization tend to produce subject leaders who only carry out responsibilities as "middle managers" to extend administrative duties, it can be implied that administrators who wish to foster informal teacher leadership need to flatten the traditional, top-down leadership hierarchy. To equalize leadership, principals can invite teachers to exercise the following informal leadership roles: (a) reform coordinator who provides leadership through oversight, planning, organization, and job-embedded professional development; (b) rotating lead teacher who assumes most functions associated with the principalship, but stays in his or her role for a predetermined period of time; or (c) coordinator of design studio schools that open doors to others who wish to witness best practices in action, and interact with outstanding teachers (Copland 2008).

With the aforementioned suggestions in mind, it can be surmised that structural change is not enough to broaden leadership in schools. Teachers need to be given the opportunity to apply their skills (Copland 2008). As a result of their research of four schools' implementation of a

particular professional development initiative, Heller and Firestone (1995) found that teachers contributed both formally and informally to many leadership functions to sustain and promote a vision for change. Teachers in these schools with positive school cultures also encouraged each other in the change process. Strong teachers recognize what their teacher leader peers bring to the table (Lieberman & Friedrich, 2007). Therefore, Heller and Firestone gathered that "one person does not have to be in charge" – a point reinforced by other researchers as well (Elmore, 2000; Hart, 1994; Kardos et al., 2001; Spillane et al., 2001). Instead, new ways of interacting are critical for transforming the infrastructure of school culture (Khourey-Bowers et al., 2005).

Finally, much information can be gleaned from studies on colleagues' perceptions of teacher leaders. After researching how peers respond to teacher leaders, Smylie and Denny (1990) deduced that teachers' perceptions of informal teacher leaders stem from the problem that peers fail to understand the role of teacher leaders in the first place. Their criticisms reveal differences in what teachers think the roles of teacher leaders should be. Essentially, teachers manufacture their own notions of teacher leadership and conceptualize what teacher leaders do.

In conclusion, what can be implied is this: Unless administrators distribute leadership, nurture informal teacher leaders' eagerness to contribute, delineate clear roles for teacher leaders, and provide both teacher leaders and their peers with professional development opportunities, "toxic cultures" (Deal & Peterson, 1998) will not change. Although a considerable amount of research has been conducted on the subject of teacher leadership and ways to encourage school cultures that promote it, researchers offer a number of suggestions for further research. These suggestions are discussed in the next section of the review of literature.

2.6.2   Suggestions for Future Research

Despite the bulk of research conducted on teacher leadership, still the subject "remains conceptually underdeveloped" (Crowther, 1996, p. 305). To learn more about teacher leadership, some researchers advocate observing teacher's work in the classroom to determine if they will find success as leaders. Pounder (2006) suggested that researchers continue to assess teacher leaders' qualities in the classroom to ascertain whether they are similar to their leadership styles. According to Pounder, an examination of teacher leaders' classroom behaviors using transformational leadership as a frame of reference could go some way to explaining why excellent teachers tend to become teacher leaders (Snell and Swanson, 2000) and conversely, why teacher leaders generally are excellent teachers. If this is found to be the case, then this might indicate a possible avenue for the development of the aforementioned fourth wave of teacher leadership.

Like Pounder (2006), Smylie (1995) agreed that basing research upon theory is imperative. Although much has been written about teacher leadership, few studies use formal theory to focus questions, guide analysis, and interpret findings.

Harris (2005) recognized gaps in the literature regarding what form or forms of leadership practice result in sustained school improvement. She questioned whether "leadership" is the correct term to use when describing the activities or influence likely to promote organizational change. To discover the factors that impact organizational change, surveys should be administered to determine the personal qualities or characteristics of principals who nurture teacher leadership and alter the structure of their organizations (Gehrke, 2004).

In lieu of examining organizational structure, Poultney (2007) recommended additional research on the subject of formal teacher leadership, and specifically, department chairs who

assume formal leadership duties. She called for studies to be conducted on the nature of effective subject leadership, and how a subject leader's role in managing culture changes as they need to create a sense of professionalism.

York-Barr and Duke (2004) listed a number of questions, which future researchers might want to attempt to answer: (a) What are the paths by which teachers positively influence student, instructional, professional, and organizational development?   (b) How might leadership by teachers be differentiated to address the numerous and varied formal and informal types of leadership work? (c) How might teacher leaders' individual leadership strengths be aligned with their leadership responsibilities? (d) By what means can the existing egalitarian norms of the teaching profession be replaced by norms that value, recognize, and actively support differentiation of teacher expertise? (e) How can teacher leaders' work be structured to maximize positive effects on teaching and learning?   (f) In what ways are principals influenced and supported in their roles as instructional leaders through collaboration with teacher leaders? (g) Given the constraints of time, schedules, access, and space, how can the work space of all teachers be reconfigured to promote continuous learning and development as a cornerstone of educational practice?   (h) What combinations of formal training and job-embedded learning support the development of effective teacher leadership? And (i) In what ways are educational leadership programs currently expecting and preparing administrators and teachers to share leadership for school improvement?

Finally, Gehrke (2004) revealed that the best way to learn about teacher leadership is by speaking with teacher leaders and their colleagues. He recommended interviewing "intervention cases" – those teachers who have worked with teacher leaders – to gather information regarding how colleagues perceive teacher leaders.   Similarly, researchers suggested learning about

110

perceptions of teacher leadership by exploring the effect of teacher leadership on the leaders themselves (Sturtevant & Linek, 2007). Sturtevant and Linek identified specific points for researchers to consider: (a) factors that motivate teachers to move into leadership roles that require them to interact with adults, rather than, or in addition to, students; and (b) significant dilemmas teachers must solve to become successful in their new roles as leaders.

2.7 WHAT IS ORGANIZATIONAL CITIZENSHIP BEHAVIOR AND HOW DOES THIS PHENOMENON APPLY TO TEACHER LEADERSHIP?

As stated above, the notion of teacher leadership, and particularly informal teacher leadership, is difficult to articulate. Learning about informal teacher leadership from classroom teachers who also lead their peers makes sense because they would know, better than anyone else, what motivates them to lead, what their leadership roles entail, and what problems, if any, accompany them. Informal teacher leaders can describe the leadership responsibilities that place them "in between" administrators and their colleagues. They can illuminate how it feels to assume this unique position, and what factors motivate them to try to initiate reform when their school cultures resist change.

Informal teacher leaders also can discuss their affinity for leadership – why they feel a sense of "professional restlessness" (Danielson, 2007), or the need to engage in extra-role behavior beyond that which is expected of them as per the terms of their contractual agreements. Finally, they can discern the specific actions that constitute extra-role behavior. Informal teacher leaders' extra-role behavior collectively can be regarded as organizational citizenship behavior (OCB). OCB is defined and described in detail below.

111

2.7.1   Definition of Organizational Citizenship Behavior

Teachers who are highly committed to their organizations should engage in behaviors beyond the minimal expectations in order to help schools achieve their goals (Somech & Bogler, 2002). Behaviors beyond minimal expectations are known as organizational citizenship behaviors (OCBs). Organ (1988) was the first to define OCB as:

> Individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system, and that in the aggregate promotes the effective functioning of the organization. By discretionary, we mean that the behavior is not an enforceable requirement of the role or the job description, that is, the clearly specifiable terms of the person's employment contract with the organization; the behavior is rather a matter of personal choice, such that its omission is not generally understood as punishable. (p. 4)
>
> Similarly, Allison, Voss, and Dryer (2008) defined OCB as "employees' extra-role behavior…that is voluntary and extends beyond normal role expectations…(that are) (1988), Allison et al. perceived OCB as that which is discretionary.

Upon reviewing the literature, Podsakoff, Mackenzie, Paine, and Bachrach (2000) identified 30 types of OCB. Because of much conceptual overlap among the 30 types, Podsakoff et al. organized the behaviors into seven categories represented in Figure 6.
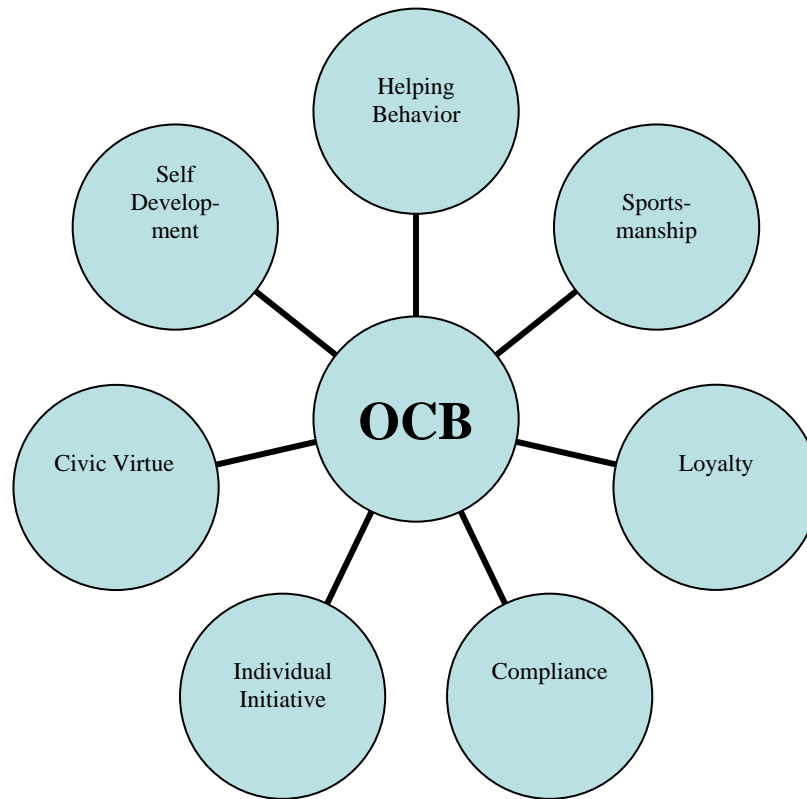
Figure 6 Seven Components of Organizational Citizenship Behavior

Helping behavior according to Podsakoff et al. (2000), involves voluntarily helping others with, or preventing the occurrence of, work-related problems. This includes Organ's (1988) ideas of altruism, peacemaking, and cheerleading, and Van Scotter's and Motowidlo's (1996) concept of interpersonal facilitation.

Sportsmanship is another category. Organ (1990) defined sportsmanship as "a willingness to tolerate the inevitable inconveniences and impositions of work without complaining" (p. 96). Podsakoff et al. (2000) categorized "good sports" as:

People who not only do not complain when they are inconvenienced by others, but also maintain a positive attitude even when things do not go their way, are not offended when

others do not follow their suggestions, are willing to sacrifice their personal interest for the good of the work group, and do not take the rejection of their ideas personally. (p. 618)

Organizational loyalty encompasses spreading goodwill and protecting the organization (George & Brief, 1992; George & Jones, 1997; Graham, 1991), and endorsing, supporting, and defending organizational objectives (Borman & Motowidlo, 1993). Organizational loyalty also involves communicating confidently about the organization so that outsiders recognize it as positive (Podsakoff et al., 2000).

Organizational compliance, also called generalized compliance by Smith, Organ, and Near (1983) and organizational obedience by Graham (1991), refers to a person's internalization or acceptance of rules, procedures, and policies, resulting in complete adherence to them, even when no one is observing. This is considered a form of citizenship behavior because even though employees are expected to obey the rules, many do not. Those who obey the rules when no one is looking are "good citizens" (Podsakoff et al., 2000).

Podsakoff et al. (2000) deemed individual initiative another tenet of OCB. This defines extra-role behavior only in the sense that it is at a level so far beyond what is minimally expected or required that it appears voluntary. Voluntary acts that improve one's task or the organization's performance fall under the category of individual initiative. Those behaviors that are "above and beyond the call of duty" are perceived by researchers to be a form of OCB.

Civic virtue is the sixth dimension of OCB. Podsakoff et al. (2000) described this as a macro-level interest in the organization, or a commitment to the organization as a whole. Along with civic virtue comes a willingness to participate actively in governance, express one's opinion, supervise the organization's environment, and look out for its best interests even at great individual cost.

Finally, self development represents the seventh category of OCB (Podsakoff et al., 2000). This idea is based upon the work of George and Brief (1992), who explained that self development is a critical component of citizenship behavior. Although self development has not been researched specifically and empirically, it does appear to be a form of discretionary behavior. Those interested in growing professionally "seek out and take advantage of advanced training courses, keep abreast of the latest advancements in their field or area, or even learn a new set of skills so as to expand the range of their contributions to an organization" (George and Brief, 1992, p. 155).

More purposely, Oplatka (2006) identified four domains of teachers' specific behavior that constitutes OCB. The four domains are summarized in Table 18.

Table 18 Four Domains of Teachers' Organizational Citizenship Behavior

Domain	To Whom Behavior is Directed	Characteristics
1	Individual students	Assist students outside of class Show compassion for less fortunate students Attend to changes in students' behavior or emotions
2	Whole class	Align instruction to students' needs Prepare instructional materials Assign and assess more work than is necessary
3	Colleagues	Share materials Offer professional assistance Assist with administrative tasks Attend to colleagues' emotional needs
4	School organization	Participate in committees Sponsor extracurricular activities and events Undertake unrewarded roles

First, teachers' OCB impacts their students. Extra-role behaviors directed toward pupils include: (a) pedagogical assistance outside of formal class time that illustrates a teacher's

acknowledgement of his or her purpose of advancing student achievement, (b) caring for students in distress because teachers who exhibit OCB show compassion for less privileged students, and (c) teachers' proactive attentiveness to pupils' emotional needs or behavioral changes. Oplatka also learned that teachers direct OCB at the class as a whole whenever they: (a) alter their instructional methodology as per students' needs, (b) creatively prepare instructional materials, and (c) assign and assess more class work than is necessary in order to provide students with as much constructive feedback as possible. A third domain of teachers' OCB is that which they express toward their colleagues. Specifically, sharing teaching materials with colleagues, offering professional assistance, helping colleagues with administrative tasks, and remaining attentive to colleagues' emotional needs were considered examples of teachers' OCB as it applied to the staff as a whole. Finally, Oplatka revealed a fourth domain of teachers' OCB that involved the overall school organization. This was exemplified by teachers' participation in school events and activities outside of school hours, involvement in ad hoc school committees, and taking on of unrewarded roles for which they did not receive compensation.

In summary, OCB is the extra-role behavior (Allison et al., 2008) in which highly committed teachers engage (Somech & Bogler, 2002) to sustain school reform. It is discretionary, unrewarded behavior that helps to further the organization (Organ, 1997). Teachers who engage in OCB demonstrate helping behavior sportsmanship, organizational loyalty, organizational compliance, individual initiative, civic virtue, and self development (Podsakoff et al., 2000). They tend to students' academic and emotional needs, assist their colleagues with administrative tasks, and participate in activities outside of regular work hours (Oplatka, 2006).

2.7.2   Organizational Citizenship Behavior as It Applies to Teacher Leadership

As far back as 1938, Barnard maintained that individuals' willingness to contribute cooperative efforts to their organizations was critical for the attainment of organizational goals. Decades later, DiPaola and Hoy (2005) built upon earlier arguments like Barnard's to arrive at a similar conclusion: Successful organizations retain employees who go above and beyond their formal role responsibilities. This altruism is not required, but it contributes to the functioning of the overall organization.

For the business field, DiPaola's and Hoy's (2005) assertion is not new; in business, OCB has been studied for two decades (Allison et al., 2008). According to DiPaola and Hoy, researchers focused their attention on OCB when they found that enactment of OCB fosters positive performance evaluations and the attainment of organizational rewards such as pay increases or promotions.

In the early 1990's, Williams and Anderson (1991) first connected OCB with job performance when they studied particular behaviors directed at individuals or organizations. Throughout the decade, interest in organizational behavior has expanded from the field of business to others: human resources management and marketing, economics, and leadership, for example (Podsakoff et al., 2000).

Since, it has been discovered that like employees in the business field, educators who exhibit OCB also help to achieve their organizations' goals. Teachers who demonstrate OCB organize social activities, volunteer for committees, agree to perform tasks that are not considered part of their formal job descriptions, and provide suggestions to improve their schools (Bogler & Somech, 2004).

Because of the school reform movement, more attention has been paid to informal leadership activities of teachers who are willing to assume responsibilities beyond those listed in their job descriptions. To sustain reform, schools depend more on teachers to act as informal leaders who help to achieve restructuring goals. However, teacher retention is becoming an issue, and this necessitates the exploration of antecedents and consequences of teachers' commitment to their organizations (Somech & Bogler, 2002). Nguni, Sleegers, and Denessen (2006) adamantly advised governments to pay close attention to teachers' job satisfaction because teachers' increased workload as a result of educational reform efforts puts huge amounts of strain on them.

This being the case, it appears as though a relationship between informal teacher leadership and organizational commitment exists. As teacher leadership continues to be discussed in education literature, teachers' OCB is gaining more notice. The studies of teacher leadership and teachers' OCB parallel each other. Some of the major more recent studies are outlined below in a brief review of the literature on OCB.

2.7.3 Abridged Review of Literature on Organizational Citizenship Behavior

The literature on OCB relates to the literature on teacher leadership. Especially concerning studies of teachers' OCB, the themes that emerged were the same as those associated with studies of teacher leadership.

First, an organization's culture affects employees' OCB (Cappelli & Rogovsky, 1998; Patnaik & Biswas, 2005). Next, a supervisor's actions strongly impact OCB (DiPaola & Hoy, 2005; Nguni et al., 2006; Oplatka, 2006; Somech & Ifat, 2007). Finally, a number of barriers, including colleagues, hinder OCB (Oplatka, 2006). Like the review of the literature on teacher

leadership, this brief review of the literature on OCB is organized according to the above

mentioned themes. Major studies informing the review are summarized in Table 19.

Table 19 Studies of Organizational Citizenship Behavior

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Podsakoff et al.	2000	To study the existing literature on the topic of citizenship behavior (CB) and organize the information into common dimensions; to explore the antecedents to CB; to note additional patterns in the literature on CB; to explore how OCB might affect an organization's overall effectiveness	A comprehensive review of literature was conducted	Thirty citizenship behaviors can be classified according to six themes.
DiPaola and Hoy	2005	To build upon earlier work in the hopes of answering the following questions: (1) Does OCB facilitate student achievement within a school? (2) If so, then how does such behavior work to improve achievement? And (3) How can the school improve OCB of the faculty?	Ninety-seven Ohio high schools with 15 or more faculty members were sampled. An organizational citizenship behaviors scale (OCBSS) was administered to teachers in each school	A positive correlation was found between faculty OCB and student achievement for both reading and math. OCB of faculty continued to impact student achievement when the authors controlled for SES and calculated the partial correlation of organizational citizenship and student achievement.
Cappelli and Rogovsky	1998	To explore whether OCB is affected more by employee involvement in decisions governing how work is organized than by employee involvement in decisions governing employee practices	Survey data was analyzed to discover which effects of employee involvement on OCB operate directly on OCB rather than through the mechanisms of job enrichment	There was a significant overall relationship between the work organization and OCB. Involvement in work organization issues has a larger and more significant total effect on OCB than does involvement in employment practices.

Table 19 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Oplatka	2006	To trace Israeli teachers' behaviors not part of their formal role obligations; to describe teachers' perspectives of the personal and contextual determinants of OCB	Qualitative study which included one to two semi-structured, in-depth interviews of 50 teachers, 10 principals, and 10 supervisors	Teachers exercise OCB that can be categorized into four domains.
Patnaik and Biswas	2005	To examine the mediating role played by OCB in the relationship between organizational identification, job satisfaction, and turnover intention of organizational members	One hundred twenty-seven school employees were surveyed, and their responses to a standardized questionnaire were analyzed statistically	Employees who are dissatisfied with their organization display less OCB. Organizational identification enhances OCB. Employees who do not identify with their organization skip the extra-role behavior like OCB.
Hoy et al.	2007	To study teachers' positive nature, and specifically, their sense of academic optimism at the individual level; to identify predictors of teachers' academic optimism	A random sampling of 350 Ohio schools with third or fourth grade classes was selected; from each school, one third and one fourth grade teacher was selected randomly to act as respondents who completed a questionnaire	Teachers' sense of efficacy, trust in parents and students, and individual academic emphasis combined to form teachers' academic optimism. Being predisposed to optimism does not guarantee academic optimism. The higher the students' SES, the higher the academic optimism of the teacher.

Table 19 (Continued)

Researcher	Date	Purpose of Study	Methodology Used	Relevant Findings
Somech and Ifat	2007	To examine simultaneously the impact of individual characteristics and an organizational characteristic on OCB in the school setting	One hundred four teachers at 8 elementary schools in Israel were sampled. Data was collected through survey questionnaires. Principals also appraised each teacher's OCB, which then was analyzed quantitatively	A positive relationship was found between perceived superior support and teacher OCB. No significant relationship was found between positive affectivity and OCB. A negative relationship was revealed between negative affectivity and OCB. There were positive and significant relationships between collectivism and teacher OCB, and specifically, altruism, conscientiousness, sportsmanship, and civic virtue. Perceived superior support and organizational values of collectivism promote teacher OCB.
Hoy et al.	2007	To study teachers' positive nature, and specifically, their sense of academic optimism at the individual level; to identify predictors of teachers' academic optimism	A random sampling of 350 Ohio schools with third or fourth grade classes was selected; from each school, one third and one fourth grade teacher was selected randomly to act as respondents who completed a questionnaire	Teachers' sense of efficacy, trust in parents and students, and individual academic emphasis combined to form teachers' academic optimism. Being predisposed to optimism does not guarantee academic optimism. The higher the students' SES, the higher the academic optimism of the teacher.

In regard to school culture, teachers' OCB is essential because if one critical group of teachers engages in OCB, then the rest will follow (DiPaola & Hoy, 2005). However, cultivating OCB in schools requires a change in the culture of schools (DiPaola & Hoy, 2005), which is a slow, difficult process because school cultures resist change (Barth, 2001). Regardless, educators interested in school reform need to continue attempting to change the way things are done because, as reported in over 160 studies, an increase in teachers' OCB will enhance their organizations' overall effectiveness (Organ, 1988; Podsakoff et al., 2000). Specifically, DiPaola and Tschannen-Moran (2001) discovered a positive link between a collegial school climate and teachers' OCB.

Cappelli and Rogovsky (1998) learned that a collaborative work environment impacts OCB. In their study of whether OCB was affected by employee involvement in decision making about organizational issues, Cappelli and Rogovsky discovered that employee involvement in decision making does improve employees' OCB. Their findings imply that work systems need to be reformed to involve employees in decision making processes. Involvement in work organization issues is the important factor that drives employee outcomes and the achievement of organizational goals.

By tracing Israeli teachers' behaviors that are not part of their formal role obligations, Oplatka (2006) was able to describe teachers' perspectives of the personal and contextual determinants of OCB. Using Podsakoff et al.'s (2000) conceptual framework of the seven dimensions of employees' OCB, Oplatka interviewed 70 educators in Israel to discern that a school's climate and atmosphere affect teachers' OCB. Basically, s school climate where positive collegial interactions take place and teachers feel a sense of belonging was connected by respondents to increased OCB. As Patniak and Biswas (2005) who studied job satisfaction

explained, "When employees identify themselves with their organizations, they display higher levels of OCB because in that case employees do not consider the behavior as extra-role" (p. 5).

Oplatka (2006) also ascertained that a school's principal significantly impacts teachers' eagerness to perform extra-role behaviors. As with the studies of teacher leadership, researchers of OCB have discovered that supervisors play an enormous role in shaping workplace culture. For example, Oplatka's study of Israeli teachers illustrated that a principal who initiates changes and innovations in school and teaching is perceived by teachers as encouraging OCB because this type of principal usually promotes an atmosphere where change is welcome. Particularly, Oplatka learned the following: (a) Principals who gave positive feedback to teachers about their work performance motivated teachers to engage in OCB; (b) principals who exercised a democratic style of leadership and who delegated tasks to teachers strengthened teachers' OCB; and (c) principals who showed concern for their teachers and an attentiveness to their needs, or who displayed emotion were those who increased teachers' OCB. According to Oplatka, "The respondents in this study claimed that a sensitive, emotional, and empathetic principal encourages teacher OCB because he or she establishes a cozy and supportive relationship with the staff members, which connects them emotionally to the school" (p. 413). Oplatka's discovery supported Patnaik's and Biswas's (2005) call for management to create an organizational climate that helps employees to "feel at home, even on the job" (p. 6).

Likewise, Somech and Ifat (2007) investigated supervisors' support and affectivity as antecedents to employees' OCB. Drawing from previous studies in the business field, Somech and Ifat surmised that employees develop general thoughts about the degree to which supervisors appreciate their contributions and genuinely care about them as individuals. Because supervisors act as representatives of the organization and have responsibility for evaluating subordinates'

performances, employees view their supervisors' favorable or unfavorable responses toward them as an indication of how the organization as a whole perceives them.

Somech and Ifat (2007) based their study of 104 Israeli teachers' OCB upon three hypotheses. First, they posited that perceived superior support would be positively related to teachers' OCB. Next, they believed that positive affectivity would be positively related to OCB, and negative affectively would be negatively related to OCB. Finally, they proposed that collectivism would be positively related to OCB, whereas individualism would be negatively related to OCB. Somech and Ifat learned that indeed, a positive relationship exists between perceived superior support and teachers' OCB, and that negative affectivity deters teachers' OCB. And they discovered that if supervisors endorse an environment in which teachers work collaboratively and congenially, then teachers' OCB increases.

Supervisors' effect upon their employees is what Davis (2002) called, "The Dilbert Phenomenon" (p. 6). She described Dilbert as "the stereotypical computer nerd" (p. 7) who, along with his coworkers, serves under an incompetent supervisor who has the greatest negative effect on them. The supervisor known by the moniker "The Pointy-Haired Boss" (because of his vaguely satanic hairstyle), "exemplifies incompetence and a lack of technological knowledge in the workplace" (p. 7). As Organ (1988) argued, employees interpret fairness to mean that their supervisors can be trusted to protect their interests, which, in turn, creates a sense of obligation to repay their supervisors through beneficial and positive actions. OCB is the outcome of reciprocity (Organ & Ryan, 1995), and if supervisors do not demonstrate the type of behavior they expect of their employees, then, like Dilbert, employees probably are not going to go above and beyond to promote their organizations.

125

As a result of their study of 97 high schools in Ohio, DiPaola and Hoy (2005) offered to principals who want to increase teacher OCB the following suggestions. Like Organ and Ryan (1995) and Davis (2002), DiPaola and Hoy called for principals to "lead by example" because being a good organizational citizen will reinforce OCB. Next, they invited principals to remain supportive and flexible when dealing with teachers, and not to focus their efforts on enforcing rules and regulations because this will not motivate teachers. In regard to formalities, DiPaola and Hoy suggested that principals maintain as few rules as possible because formality breeds rule-oriented and rigid behavior – the antithesis to teacher OCB. Third, DiPaola and Hoy encouraged principals to nurture their informal teacher leaders by praising them when they demonstrate good OCB, and working collaboratively with them to solve problems that may result from their willingness to take on extra responsibilities. Fourth, principals were urged to treat teachers as professionals with expertise and commitment to their students by giving them autonomy to experiment in their classrooms. Finally, DiPaola and Hoy warned principals about needing to protect teachers against the micropolitics of schools, as well as other obstacles that might impede their OCB.

In addition to the micropolitics of schools, unsupportive administrators, and poisonous school cultures, other barriers prevent teachers from exhibiting OCB. For example, Oplatka (2006) reported that some OCB-oriented teachers told of their colleagues' negative responses to their initiatives, or negative emotions toward them personally. Furthermore, respondents discussed how their physical and emotional energy was drained as a result of the increased work-family conflicts brought about by their OCB.

Davis (2002) presented the subject of "organizational cynicism" (Dean, Brandes, & Dharwadkar, 1998) resulting from colleagues' observation of OCB. Explaining that after a brief

period of increased employee loyalty following the tragic events of September 11, 2001, organizational members have become skeptical about their employers' motives and actions. She contended that this skepticism stems from the transformation of our economy from founded upon capital to one based upon information processes and experiences. According to Dean et al. (1998) who coined the term, "organizational cynicism" is based upon three components: (a) the belief that the organization lacks integrity, (b) negative affect towards the organization, and (c) a tendency to act on those beliefs by enacting critical and disparaging behaviors toward the organization and those who support it. Specifically, "organizational cynics believe that the practices of their organization betray a lack of such principles as fairness, honesty, and sincerity" (Dean et al., 1998, p. 346). This might explain why employees who are dissatisfied with their organization display less OCB (Patnaik & Biswas, 2005).

Organizational cynicism (Dean et al., 1998) may be the reason why some teachers oppose the idea of their informal teacher leader colleagues engaging in extra-role behavior or demonstrating a sense of "academic optimism" (Hoy, Hoy & Kurz, 2007). However, teachers' assignments also may serve as a barrier to their OCB. For example, Hoy et al. (2007) found that teachers' academic optimism – their commitment to the profession as displayed through their citizenship behaviors – is predicted by the socioeconomic status of their students. Basically, Hoy et al. discovered that the more urban the school, the lower the academic optimism of teachers. Essentially, teachers' sense of efficacy, trust in parents and students, and individual academic emphasis were affected by their students' poverty.

2.7.4 Suggestions for Further Research

Despite the bulk of information on employees' OCB in business settings, the literature on teachers' OCB in schools is limited (DiPaola & Tschannen-Moran, 2001). Like Nguni et al. (2006) explained, the literature detailing teachers' OCB in Western societies especially is scant. Oplatka (2006) called for studies of teachers' OCB to be conducted in the United States, particularly. Also, the literature on OCB is more focused on understanding the relationships between organizational citizenship and other constructs, rather than defining the nature of citizenship behavior itself. Perhaps researchers could conduct longitudinal studies to ascertain how OCB manifests itself in schools over time (Somech & Bogler, 2002; Somech & Ifat, 2007).

Podsakoff et al. (2000) called for more attention to be placed upon the theoretical explications of OCB and its measures, but Bogler and Somech (2004) pointed out that future researchers need to explore in greater detail how supervisory support of job satisfaction impacts teacher empowerment. DiPaola and Hoy (2005) invited researchers to determine if teacher empowerment and shared decision making increase OCB. They also recommended exploring the following questions: (a) Will the findings of their study of high schools remain the same if either elementary or middle schools are studied? (b) What factors facilitate the development of OCB (How is organizational citizenship related to the development of faculty trust in colleagues? How pivotal is the development of teacher trust?)? (c) Is gender an important variable in the development of OCB? (d) How does collective efficacy interact with organizational citizenship to produce student achievement? (e) To what extent do organizational politics impede or facilitate the development of OCB? And (f) to what extent are reflective and mindful administrators necessary to the promotion of a culture of OCB?

Allison et al. (2008) suggested that the subject of OCB be extended to students to determine how their extra-role behavior along with that of their teachers, might improve their achievement. Similarly, Hoy et al. (2007), who learned that talented and motivated students are perceived as high achievers, requested that studies be conducted to distinguish whether teachers' academic optimism begets students' academic optimism. They tempted future researchers with information: "Optimistic norms in a school should reinforce individual tendencies to be optimistic just as a pessimistic faculty would dampen individual teacher's optimism" (p. 833). With this in mind, Hoy et al. asked scholars to identify individuals and schools that demonstrate different levels of academic optimism, and then use case studies to explore important influences in the development and enactment of teachers' and students' academic optimism. Somech and Bogler (2002) contended that sources other than teachers might be used to measure teachers' OCB. Nguni et al. (2006) argued that one such influence might be parents – another issue raised for future researchers.

Podsakoff et al. (2000) proposed numerous areas for additional research. For example, they did not appear convinced that teachers' citizenship behaviors are distinct from in-role behaviors. Podsakokff et al. wondered if some behavior deemed "discretionary" (Organ, 1988) by the organization actually is considered by employees to be part of their role requirements. They encouraged researchers to ask respondents if their behavior is: (a) an explicit part of their job descriptions, (b) something they were trained by the organization to do, and (c) formally rewarded when demonstrated, and punished when not exhibited.

Another question for future research is: Do different forms of citizenship behaviors have unique antecedents or consequences? According to Podsakoff et al. (2000), "If these forms of behavior do not have unique effects on organizational success, or do not have different

antecedents, they are essentially equivalent constructs." However, if they have unique effects, then they are important to understand and develop.

Other consequences of citizenship behavior worth investigating are individual level consequences, and specifically, how extra-role behavior impacts managerial judgments. Podsakoff et al. (2000) called for researchers to scrutinize in great detail the nature of the interaction between in-role and extra-role performance. Yet another area for future investigation is group or organizational consequences. Perhaps it will be discovered that when a portion of one's pay is determined by group effort, OCB might be expected to be directed at helping and supporting one's peers (Podsakoff et al., 2000). Future researchers also might investigate potential moderating effects of individual differences on OCB, and the mechanism through which OCB occurs. And Podsakoff et al. challenged scholars to examine the extent to which managers consider OCB when evaluating their subordinates' performances.

Finally, Podsakoff et al. (2000) elucidated that researchers must explore the impact cultural context might have on citizenship behavior. Specifically, cultural context may effect: (a) the forms of citizenship behavior observed in organizations, (b) the frequency of different types of citizenship behavior (c) the strengths of the relationships between citizenship behavior and its antecedents and consequences, and (d) the mechanisms through which OCB is generated, or though which it influences organizational success.

2.8   HOW HAS THE REVIEW OF LITERATURE INFLUENCED THIS STUDY?

This review of literature on teacher leadership and organizational citizenship behavior has influenced this study of informal teacher leadership. First, it provided a framework for the study.

Next, it informed the issues raised and research questions presented in Section 1.3, and discussed in great detail in Chapter 3. Finally, it influenced the inquiry strategy discussed in Section 3.1. This information is detailed below.

2.8.1   The Framing of This Study Based Upon the Literature Reviewed

In light of the aforementioned suggestions for further research and specifically Oplatka's (2006) call for studies of teachers' OCB to be conducted in the United States, as well as Birky et al.'s (2006) assertion that little is written from teacher leaders' perspectives, this research will be organized according to how informal teacher leaders perceive themselves and their roles. Informal teacher leaders will be asked to offer their perspectives regarding why they choose to engage in extra-role behavior (Organ, 1990) that requires them to extend beyond their classrooms.

For the purposes of this study, informal teacher leaders' extra-role behaviors (Organ, 1990) will be considered examples of OCBs. As explained above, informal teacher leaders engage in behaviors that are voluntary (Leithwood, 1997; Martin, 2007). Informal teacher leaders' voluntary behavior also may be termed "discretionary" (Organ, 1988). Described as the "foot soldiers" who help to move their schools forward (Whitaker, 1995), informal teacher leaders' behavior like teachers' OCB, "promotes the effective functioning of the organization" (Organ, 1988. p. 4). As with teachers' OCB that is "not directly or explicitly recognized by the formal reward system" (Organ, 1988, p. 4), informal teacher leaders' actions often are not compensated (Muijs & Harris, 2007). Regardless, schools now depend upon their teachers' willingness to exert effort beyond that which is specified as per their contractual agreements (Somech & Bogler, 2002).

Organ (1990) proposed that OCB denotes "those organizationally beneficial behaviors and gestures that can neither be enforced on the basis of formal role obligations nor elicited by

contractual guarantee of recompense" (p. 46). Although not branded as such in the existing literature, one can surmise that informal teacher leaders engage in OCB. Until this point, informal teacher leadership in conjunction with teachers' OCB never has been investigated namely because informal teacher leaders' extra-role behavior (Organ, 1990) has never been regarded as examples of OCB.

In order to examine the phenomenon of informal teacher leadership as determined by informal teacher leaders' OCB, Oplatka's (2006) study of Israeli teachers will serve as a guide for further research. Oplatka acknowledged that little research on the subject of teachers' OCB exists, and no research on the topic highlights American teachers' OCB. She also noted that most of the investigations done to date have been quantitative studies of personal and contextual factors linked to teachers' OCB. Therefore, a qualitative exploration of informal teacher leadership and informal teacher leaders' OCB will be conducted. Specific methodology and rationale will be discussed in the next chapter of this dissertation.

2.8.2 The Issues Raised in This Study Based Upon the Literature Reviewed

As introduced in Table 4, the literature has informed the issues raised in this study. For example, Crowther (1996) had asserted that the subject of teacher leadership is "conceptually underdeveloped," thus constituting a need for the topic to be investigated further. Seven years later, Lambert (2003) substantiated Crowther's claim by deeming the notion of teacher leadership abstract. Therefore, this study will attempt to situate teacher leadership – particularly informal teacher leadership – within specific contexts so that the subject, in general, might be understood more concretely.

This study also will serve to understand informal teacher leadership from the perspective of informal teacher leaders, their colleagues, and their supervisors. As recently as 2006, Birky et al. noted an absence of literature written from the perspective of teacher leaders. Additionally, Gehrke (2004) explained that teacher leadership might be better understood if teacher leaders' colleagues were given the opportunity to share their thoughts on the subject. Therefore, this study will investigate how informal teacher leaders and those who work with them regard informal teacher leadership.

Finally, this study will attempt to apply the concept of organizational citizenship behavior (OCB) to the subject of informal teacher leadership. In terms of their descriptions, Podsakoff et al.'s (2000) seven dimensions of OCB parallel numerous researchers' identifications of informal teacher leadership (Crowther et al., 2002; Moller et al., 2001; Wilson, 1993). As suggested by Sturtevant and Linek (2007), informal teacher leaders will be asked to discuss how, when, and why they might choose to extend themselves beyond their classrooms – a behavior common to informal teacher leaders (Blasé & Blasé, 2000; Wilson, 1993). Teachers who do not engage in OCBs also will offer their insight regarding factors that discourage them from assuming leadership responsibilities. Hence, as a result of this type of study as recommended by Podsakoff et al., (2000), educators may be able to recognize a connection between conditions within their organization and teachers' willingness to engage in OCBs and therefore act as informal leaders.

2.8.3 The Inquiry Strategy Employed for This Study Based Upon the Literature Reviewed

This study of informal teacher leadership will employ qualitative inquiry strategies. According to the literature, the best way to learn about teacher leadership is by speaking with teacher leaders

(Gehrke, 2004) regarding how leading has affected them personally and professionally (Sturtevant & Linek, 2007). Therefore, informal teacher leaders will be interviewed, and data generated from interviews will be analyzed and interpreted as described in the next chapter on research methodology.

3.0   METHODOLOGY

This chapter explains the research methodology used to complete this qualitative study of informal teacher leadership; it provides a detailed description of all aspects of the design and procedures employed. Specifically, I: (a) describe inquiry strategies that led me to consider the framework for this study; (b) discuss research questions and associated assumptions; and (c) define the research settings and populations. Additionally, I discuss methodology used to address the research questions, and methods of triangulation used to ensure the validity of the study. Finally, throughout this chapter, I weave information about my personal experiences that have influenced the nature of the research.

3.1   INQUIRY STRATEGIES EMPLOYED

I used qualitative, ethnographic research methodology to frame this phenomenological study of informal teacher leadership; however, this study is not a traditional ethnography. Traditional ethnographic research is a qualitative research method where a researcher uses participant observation and interviews in order to gain a deeper understanding of a group's culture (Hatch, 2002). A group's culture may be considered the phenomenon under study. According to Mertens (2005), "The key characteristic of phenomenology is the study of the way in which

members of a group or community themselves interpret the world and life around them" (p. 240). For this study, I interviewed informal teacher leaders and their colleagues to learn how they perceive their work so that I might gain a more thorough understanding of the phenomenon of informal teacher leadership. However, I did not observe informal teacher leaders and their colleagues in their respective work environments (This is one limitation of the study discussed in Section 1.4.2). The following text discusses the specific framework I used for this study, as well as the type of ethnographic research methodology I employed to investigate the phenomenon of informal teacher leadership.

3.1.1   Using Personal Experience, a Constructivist Framework, and Qualitative Research Methodology to Study the Phenomenon of Informal Teacher Leadership

Throughout my 15-year career as an educator, serving as an informal teacher leader has left me with many more questions than answers. These questions result from some of the experiences I have had while engaged in informal leadership activities. For example, some colleagues have questioned my motives for choosing to interact regularly with school administrators – a behavior common to teacher leaders (Muijs & Harris, 2007). Others have communicated their displeasure for any teacher who extends himself or herself beyond which is required.

Upon becoming interested in teacher leadership, I began to reflect upon such occurrences at work from a different angle. Instead of questioning my colleagues' seemingly negative perceptions of teachers who choose to do extra, I considered *why*, at times, they appeared unsupportive of teacher leaders' work. Additionally, personal reflection has prompted me to wonder why I continue to lead despite numerous barriers (less than supportive colleagues, a lack of time, few financial incentives, and insufficient training). Questions, as well as my experiences

and area of specialization, drove me to investigate teacher leadership as the subject of formal study.

To decide upon a suitable framework for this study, I closely considered my assumptions about how the world is organized and how I wanted to explore the subject of informal teacher leadership. These considerations caused me to deem my paradigm orientation as constructivist. I wanted to investigate informal teacher leaders' unique experiences by using a constructivist framework. Essentially, I recognized the existence of multiple, distinctly inherent realities (Hatch, 2002) constructed by informal teacher leaders who experience leadership from their own vantage points. For example, the current literature on teacher leadership notes that despite researchers' best efforts to define the term, no universal definition exists (Lambert, 2003). This point implies that the term may hold different meanings or realities for teacher leaders themselves. Therefore, informal teacher leaders' diverse experiences may represent the "multiple realities" (Weiss, 1994) accepted by constructivist researchers. I wanted to investigate these "multiple realities" and use them to construct my own. Informal teacher leaders' personal experiences, along with my own knowledge and understanding of informal teacher leadership based upon my own experiences, have helped me to construct meaning and perhaps understand informal teacher leadership from both a personal and professional perspective.

Because I identify most clearly with the constructivist paradigm, I remained sensitive to the meanings that informal teacher leaders brought to the phenomenon under study so that I could use the findings to develop a stronger understanding of my own role as an informal teacher leader. Informal teacher leaders (as described in Section 1.1.2) were the participants who informed the bulk of the study. Their subjective experiences served as the basis for study, and I, as the researcher, acted as the primary data collection instrument. Throughout the study, I

137

remained interested in using informal teacher leaders' perceptions of their roles to determine how they might understand the subject of teacher leadership and the cultural conditions that encourage or hinder their leadership practices, and demonstrate varying degrees of organizational citizenship behaviors. I also struggled to learn how both school administrators and informal teacher leaders' teaching colleagues (who do not act as leaders) perceive the role of informal teacher leaders and the cultures of their respective schools.

Since I am an informal teacher leader and therefore a member of the group being studied, I was able to generate a clearer description of myself by accounting for my own experiences as situated in the culture of informal teacher leadership. I came to a better understanding of myself by constructing a portrait of informal teacher leadership based upon the data I gathered from participants. My experiences, research orientation, and assumptions (Assumptions are discussed in Section 3.2) helped me to form the lenses I needed to use in order to analyze the findings from an insiders' perspective, but report them so that outsiders can become familiar with the phenomenon.

To begin the research, I first thought exhaustively about my personal experiences as an informal teacher leader and chronicled them. Then, I decided which aspects of the phenomenon I wanted to study and wrote three overarching research questions (discussed in Section 3.2). After considering my own biases and assumptions, I wrote answers to the questions presented on the interview guide I constructed specifically for my interviews with informal teacher leaders (Interview guides are discussed in more detail in Section 3.4). Next, I interviewed other informal teacher leaders who work in suburban middle school settings similar to my work environment. Using a system of coding and sorting (described in Section 3.4), I then analyzed and interpreted the data corpus. Finally, I applied the findings to my own experiences as an informal teacher

leader. As I gathered, interpreted, and analyzed participant data, I began to acquire a stronger understanding of myself to draw formal comparisons between other informal teacher leaders' experiences and mine.

Although three primary research questions guided my work, I investigated the *phenomenon* of informal teacher leadership. Thus, I initially was not certain how this heuristic investigation was going to unfold. In the interest of qualitative research, no formal hypothesis was generated and no statistical analysis of data was employed. My theoretical assumptions (discussed in Section 3.2) provided a framework for the study, but I remained open to any type of data participants generated through interviews. Simply, I had identified and extensively researched the phenomenon under study, but when I began my research, I was not entirely sure as to how the study was going to unfold.   Basically, I knew that I wanted to study informal teacher leadership by using the literature and my assumptions as a frame of reference; however, I entertained the possibility that upon investigation, I might discover something unexpected.

In order to present my findings as phenomenological text, I sought insiders' perspectives of informal teacher leadership by listening to their stories and learning of their experiences as informal teacher leaders. According to van Manen (2005), a phenomenological text invites the reader to wonder because, "all interpretive phenomenological inquiry is cognizant of the realization that no interpretation is ever complete, no explication of meaning is every final, no insight is beyond challenge" (p. 7). As a fellow informal teacher leader, I may take for granted some of the behaviors that have become part of informal teacher leaders' everyday practice. At times, the ritualized experiences of informal teacher leaders may seem unremarkable to me. But, by investigating the roots of these experiences, I was able to discover some of the meaning behind the original phenomena that gave rise to informal teacher leadership. By refusing "to

accept the taken-for-granted dimension" (p. 10) of informal teacher leadership and presenting my research as *a* way to understand human nature in lieu of *the* way, I invited educators to wonder – to interact actively with the text by reflecting upon their own nature, and then to ask questions.

Supportive of van Manen's (2005) thoughts about incorporating wonder into research, I may leave some readers with more questions than answers. Van Manen asserted:

The greatest hindrance to gaining access to the phenomenology of wonder and the wonder of phenomenological method is perhaps our cultural inclination to devalue passivity in favor of a pervasive activism and a valuing of information in all realms of inquiry. We are so inclined to convert research into action and usable "results" that this activism can limit our possibility for understanding. (p. 250)

Presentation of information as phenomenological text instead of as a conclusive argument may orient readers reflectively to the lived experiences of others so that they draw their own conclusions and ask their own questions. Just as I used information I gleaned from this study either to confirm or reframe my assumptions of informal teacher leadership, I hope readers reflect upon their own experiences as educators. Perhaps their conclusions and questions can inform future studies of the phenomenon.

3.2   RESEARCH QUESTIONS EMPLOYED AND ASSOCIATED ASSUMPTIONS

This study of informal teacher leadership explored the following research questions: (a) What does the term, "informal teacher leadership" mean in different contexts? (b) How do informal teacher leaders perceive themselves and their roles? And (c) how, when, and why do some

teachers develop into informal teacher leaders? These overarching research questions, subsequent research questions, and associated assumptions are discussed below.

3.2.1   What Does the Term, "Informal Teacher Leadership," Mean in Different Contexts?

The absence of a universal definition of teacher leadership (Lambert, 2003) implies one of two ideas: Either more research needs to be conducted to generalize behaviors of teacher leaders in order to define teacher leadership, or teacher leadership cannot be defined because it is a situational construct. As a teacher leader, I struggle to define teacher leadership in a way that encompasses all the behaviors and personal qualities of teacher leaders in every situation; therefore, I suspect the latter. Consequently, the first research question that was explored is: What does the term, "informal teacher leadership," mean in different contexts?

Based upon my personal experiences, I believe that informal teacher leaders understand teacher leadership in various ways that derive from their personal experiences as teacher leaders. Although I may not be able to define teacher leadership as an outcome of research, I instead may be able to identify situations or contexts that lend themselves to particular applications of teacher leadership or behaviors of teacher leaders. Furthermore, I may be able to identify situations or contents that stifle teacher leadership.

3.2.2   How Do Informal Teacher Leaders Perceive Themselves and Their Roles?

Because informal teacher leaders' roles are undefined (Gehrke, 1991) and little is written from the perspective of teacher leaders (Birky et al., 2006), this study focused on educators' perceptions of teacher leadership and teacher leaders themselves. Research questions to

substantiate the first overarching research question included: (a) How do informal teacher leaders perceive themselves and their roles? (b) How do school principals perceive informal teacher leaders and their roles? And (c) how do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles? I am interested in discovering whether or not informal teacher leaders, school principals, and colleagues agree that informal teacher leaders' primary role is to improve student achievement. Furthermore, I wish to learn what "student achievement" means to respondents – particularly, if they perceive "student achievement" as a collection of students' grades and standardized test scores, or if they regard it as more holistic to encompass students' overall well-being.

How informal teacher leaders perceive themselves as leaders, and how they think their administrators and colleagues perceive them, may determine whether or not they achieve their goal of increasing student achievement. Based on my professional experience, I believe that through their leadership activities and the responsibilities they choose to assume, informal teacher leaders do assist in improving student achievement. However, for informal teacher leaders, the task of improving student achievement seems to become secondary to circumventing barriers and dealing with the micro-politics of schools if administrators and colleagues fail to support their work.

3.2.3 How, When, and Why Do Teachers Develop Into Informal Leaders?

Despite Oplatka's (2006) call for studies of teachers' organizational citizenship behaviors in countries other than Israel, the subject of organizational citizenship behavior has not yet been applied to teacher leadership in the United States. Therefore, my next research question is: How, when, and why do some teachers develop into informal teacher leaders while others do

142

not? Two subsequent questions are: (a) What conditions encourage informal teacher leaders to engage in organizational citizenship behaviors, and how? And (b) what conditions discourage teachers from acting as informal teacher leaders or engaging in organizational citizenship behaviors, and how?

I believe the behaviors unique to informal teacher leaders can be classified as examples of organizational citizenship behaviors (OCBs) (Oplatka, 2006; Organ, 1990; Podsakoff et. al, 2000). OCBs are extra-role behaviors (Organ, 1990) that help reform organizations. When I consider the literature on school reform, I note that the types of informal leadership behaviors researchers deem necessary to move school districts forward parallel the OCBs proven critical for organizational reform.   Thus, for the purposes of this study, I use Podsakoff et al.'s (2000) seven examples of extra-role behaviors, and Oplatka's (2006) four domains of OCBs to frame the behaviors of interviewed informal teacher leaders.

I assume that teachers' willingness to engage in OCBs possibly might be the factor that separates informal teacher leaders from their peers who do not serve as teacher leaders. Through their OCBs, informal teacher leaders might be able to impact student achievement if they manage to navigate through barriers to their work. Additionally, for teachers to engage in OCBs, particular conditions (like collegial school cultures) may need to exist. I suspect that school size also influences informal teacher leadership (These assumptions are presented below); my study may strengthen this notion.

3.2.4   Additional Assumptions Associated with the Research

As described in the next section of this chapter, I researched informal teacher leadership in middle schools of different sizes. This helped me to investigate a proposition I hold: School size

might be a factor influencing teachers' willingness to extend themselves beyond their classrooms to assume informal leadership roles. By conducting research in middle schools of various sizes, I was able to consider whether or not school size or culture might impact informal teacher leadership in terms of the: (a) time teachers are allotted to assume informal leadership responsibilities, and (b) sense of community necessary to sustain a culture conducive to informal teacher leadership. In sum, I had planned to add to the literature on teacher leadership since no connection between school size and informal teacher leadership was presented in the literature reviewed. The following two sections address these assumptions.

3.2.4.1 School Size May Affect Informal Teacher Leadership

For example, school size may affect the time teachers have to engage in informal teacher leadership responsibilities. Time is among the number of well-documented barriers to teacher leadership (Barth, 2001; Blegen & Kennedy, 2000; Muijs & Harris, 2007; Suranna & Moss, 2000; Wasley, 1991). Many teachers believe they have no time for leadership since the day-to-day demands of their jobs often keep them confined to their classrooms (Muijs & Harris, 2007). Enrollment size might influence teachers' perceptions of their jobs as educators charged with the task of improving student achievement or their willingness to serve as informal teacher leaders. Teachers in large schools within competitive school districts where students' success on high-stakes tests is imperative simply might not have the time to leave their classrooms to engage in informal leadership tasks.

3.2.4.2 A Sense of Community among Teachers May Affect Informal Teacher Leadership

Another condition that may influence the growth of teacher leadership is a sense of community. Like time does, school size also might affect the types of relationships among colleagues that

manifest in schools. Whereas teacher leadership is often disrupted by colleagues who honor the egalitarian norms of the profession and therefore suffocate teachers who might wish to lead informally (Barth, 2001; Johnson & Donaldson, 2007), teacher leadership thrives in school cultures where collaboration among colleagues occurs (Barth, 2006; Hargreaves, 1994). Hence, smaller school settings might prove more supportive of informal teacher leadership because teachers in smaller schools may embrace a collegial school culture if they need to rely upon one another for resources or assistance. Also, principals of small schools may expect all teachers to lead since they often do not work with an assistant principal, and therefore must distribute leadership responsibilities to all professionals in their buildings (Elmore, 2000). Researchers have discovered that principals who set the expectation that all teachers can and will become leaders maintain a school culture that nurtures informal teacher leadership (Blegen & Kennedy, 2000). In school buildings where boundaries between leaders and teachers are blurred to make equality the norm, a successful school culture that nurtures teacher leadership flourishes (Kardos et al., 2001). Smaller schools might serve as the type of environments in which informal teacher leaders can blossom.

3.3 RESEARCH SETTINGS AND POPULATIONS

For this study of informal teacher leadership, two suburban middle schools of different sizes served as research settings. There, systems of convenience, purposive, and snowball sampling (Hatch, 2002) were used to identify three categories of respondents: (a) principals (acting as key informants) who supervise informal teacher leaders and who recommended respondents for

study; (b) informal teacher leaders; and (c) colleagues who work alongside informal teacher leaders, but who do not serve as teacher leaders themselves. Section 3.3.1 discusses the research settings, and Section 3.3.2 addresses how I identified, recruited, and ensured confidentiality for respondents.

3.3.1   Research Settings

Three suburban middle schools in Southwestern Pennsylvania served as research settings. Although much of the research was conducted at locations other than the schools, most data gathered included information regarding activities or behaviors that take place or had occurred in the middle schools sampled.

Since the research population under study represents an unusual case (Patton, 1990) – teachers who go beyond their role expectations – the schools as research settings were sampled purposefully. The three middle schools in which research was conducted differed in size: (a) Smallville is small with an enrollment of no more than 300 students; (b) Middleton is medium sized with an enrollment of between 300 and 600 students; and (c) Bigland the middle school in which I work, is large with an enrollment of more than 600 students. Table 20 compares the approximate enrollment and number of staff members in the three schools that served as research settings (Information reported in Table 20 was found on line at www.greatschools.net).

Table 20 Approximate Enrollment of Schools Serving as Research Settings

Information Category	School A	School B	School C
Grade Levels	7, 8, and 9	6, 7, and 8	7 and 8
Approximate Student Enrollment	200	530	900
Number of Building-Level Administrators	1	2	2
Number of Teachers	7	32	48
Approximate Teacher to Student Ratio	1:29	1:17	1:19

As research settings, I purposefully selected Smallville and Middleton – suburban middle schools located in the same region as my home district – for the following reasons. First, the research settings are somewhat familiar to me in regard to their locations and student populations. I have acted as an educational consultant in these districts, and therefore am familiar with the school communities and cultures. Since I have acted as an informal teacher leader only in a suburban middle school setting in Southwestern PA (Bigland), and since I intended to use my findings to broaden my personal understanding of informal teacher leadership, I planned to research in middle school settings familiar to me so that I might offer a deeper analysis of the findings. For the purposes of this research, conducting research in familiar settings allowed me to introduce into the analysis of data my own interpretations based upon personal experience.

3.3.2   Research Populations

As a matter of convenience, I conducted research in schools with principals I know personally. Having developed collegial relationships with them, I felt confident that they would provide me with the resources necessary to conduct research. As gate-keepers, principals also contacted the superintendents to seek their permission and ensure the superintendents that they endorsed my work. Principals also served as key informants who recommended respondents for the study.

In the suburban middle school settings, the school principals – identified through a system of convenience sampling – served as key informants who obtained permission for the study from their superintendents, acted as respondents, and as gate keepers, recommended additional respondents for study. I personally know the two school principals sampled. I had asked them to participate for three reasons. First, they are familiar with research protocol at the University of Pittsburgh and therefore understand the basic nature of this formal study. Next, the principals are colleagues with whom I have collaborated closely; hence, they know me as a credible researcher and ethical individual. Finally, as principals of suburban middle schools in Southwestern Pennsylvania, I suspected that they could provide me with data regarding the specific phenomenon studied.

Based upon the operational definition of informal teacher leadership, descriptions of informal teacher leaders, and examples of organizational citizenship behaviors, principals recommended for this study informal teacher leaders in their respective schools who clearly demonstrate the desired behaviors or possess the noted personal qualities. Since this study is about informal teacher leadership as described in detail in Chapter 2, I chose respondents because they either do not assume formal leadership responsibilities within their schools, or assume informal leadership responsibilities even beyond those they may assume formally. For

example, most respondents currently do not serve as department heads, curriculum coaches, paid mentors, or in any other capacity that affords them an official title or compensation in the form of time or money. Furthermore, the few respondents who earn a stipend to coach – a formal leadership responsibility – also engage in various informal leadership tasks that are not connected to their formal duties.

For this study, principals also recommended colleagues of informal teacher leaders. According to their current principals, these teachers never have served in any leadership capacity, either formally or informally. This means that before principals recommended participants for this study, they needed to learn the descriptions of informal teacher leaders and OCBs. Thus, principals were contacted first; during the initial meetings, principals learned how I defined informal teacher leadership for the purposes of this study, as well as the types of behaviors and personal characteristics they might recognize in potential respondents.

A questionnaire used to assist principals with the recommendation of potential respondents is presented in Appendix A. The intention of this questionnaire was threefold. First, principals used the questionnaire to assist them with the recommendation of informal teacher leaders who were given the opportunity to participate in the study. The questionnaire ensured that principals recommended potential respondents according to the operational definition of informal teacher leadership and the description of informal teacher leaders employed for the purposes of this study. Next, the questionnaire helped principals recommend additional potential respondents: teachers who do not engage or never have engaged in informal leadership activities. Finally, principals' responses to the questionnaire allowed me to recognize those behaviors of informal teacher leaders that they deem most important in terms of exercising leadership. Since one of the purposes of this study is for me to propose ways for administrators

149

to reinforce informal teacher leadership within their schools, I analyzed principals' responses to the questionnaire to generate empirical data regarding the specific behaviors that administrators might recognize in teachers with the capacity to lead informally.

Additionally, principals' responses to the questionnaire informed the questions I asked during formal, semi-structured, in-depth interviews with all respondents. Because principals wrote on the questionnaire specific examples of informal leadership behaviors some teachers displayed, I was able to guide these teachers' thinking during interviews by asking for similar examples.

As the researcher, I selected more potential respondents than necessary, and then invited them to participate in this study. Recruiting respondents in this manner helped to maintain their anonymity. Although the principals knew whom they recommended to participate in this study, they failed to know for certain which respondents I had selected to participate, and which of those respondents had consented.

Through snowball sampling, the informal teacher leaders with whom I interacted also recommended colleagues who might have been willing to participate in the study as well. Although my intention initially was to investigate no more than ten educators in each middle school setting, I certainly welcomed engagement with additional participants if those involved believed that interviewing their colleagues would enhance this study.

All potential respondents first received a formal letter elucidating the study and arguing for the importance of their participation. The letter sent to potential respondents is referenced in Appendix B. If those who received a formal invitation to participate in this study wished to do so, then they contacted me via either e-mail or telephone.

If a potential respondent had contacted me via e-mail, then I made a subsequent telephone call to explain the following information in greater detail than that which was outlined in the letter they received: (a) who I am, (b) the reason for the study, (c) the study's sponsorship, (d) my responsibilities as the researcher, (e) participants' responsibilities and rights, and (f) how the study will be conducted. During these telephone conversations, I arranged to send each participant a copy of the formal consent form they needed to sign to confirm their participation. The dates, time, and locations of the in-depth, formal interviews also were established during these initial telephone conversations. Respondents were asked to choose the dates, times, and locations of the interviews so that their participation was made as convenient for them as possible.

Respondents who agreed to participate were asked to sign a consent form ensuring the authenticity of the study, confidentiality, and my legitimacy as a University researcher. Noted in Appendix C is an example of the consent form that all participants signed. What follows is information regarding specific research methodology employed to address each of the research questions.

3.4   RESEARCH METHODS

Qualitative research methods were used to address each of the research questions identified above. Most data were collected via formal, in-depth, semi-structured interviews with respondents. Additional methods of data collection included observation of respondents during interviews, and personal narratives written by respondents who chose to offer their feedback regarding the interviews. The following sections detail the specific data collection methods,

151

rationale for employing the methods, and methods of triangulation that were used to ensure the validity of research. Table 21 summarizes methods of data collection and triangulation to ensure the validity of data gathered to address each research question. Table 22 illustrates the specific data collection method(s) that were used to answer each of the research questions.

Table 21 Methods of Data Collection and Triangulations

Research Question(s)	Population Sampled	Method(s) of Data Collection	Method(s) of Triangulation
What does the term, "informal teacher leadership," mean in different contexts? How do informal teacher leaders perceive themselves and their roles? How, when, and why do some teachers develop into informal teacher leaders while others do not?	Informal teacher leaders as identified their by middle school principals	• Formal, semi-structured interviews • Narratives written by respondents who chose to write • Follow-up interviews, if necessary	• Written narratives by and follow-up interviews with informal teacher leaders will serve as triangulation for data gathered via formal, semi-structured interviews • Respondents will be given the opportunity to review and respond to interview transcripts • Examination of espoused versus enacted theories of teacher leadership

Table 21 (Continued)

Research Question(s)	Population Sampled	Method(s) of Data Collection	Method(s) of Triangulation
How do middle school principals perceive teacher leaders and their roles? How, when, and why do some teachers develop into informal teacher leaders while others do not?	Middle school principals identified via convenience sampling	• Formal, semi-structured interviews • Narratives written by respondents who chose to write • Follow-up interviews, if necessary • Principals' responses to the questionnaire used to recommend respondents	• Written narratives and follow-up interviews will serve as triangulation for data gathered through formal, semi-structured interviews • Respondents will be given the opportunity to review and respond to interview transcripts • Examination of information gleaned from the review of literature versus data gathered • Cross reference of data gathered via interviews and principals' responses to the questionnaire

Table 21 (Continued)

Research Question(s)	Population Sampled	Method(s) of Data Collection	Method(s) of Triangulation
How do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles? How, when, and why do some teachers develop into informal teacher leaders while others do not?	Teacher leaders' colleagues who do not assume leadership responsibilities as identified – through snowball sampling – by both middle school principals or informal teacher leaders	• Formal, semi-structured interviews • Narratives written by respondents who chose to write • Follow-up interviews, if necessary	• Written narratives and follow-up interviews will serve as triangulation for data gathered through formal, semi-structured interviews • Respondents will be given the opportunity to review and respond to interview transcripts • Examination of information gleaned from the literature versus data gathered

Table 22 Data Collection Methods Used to Address Each Research Question

Data Collection Method	Formal, Semi-Structured Interview	Personal Narrative, if Written	Follow-Up Interview, If Necessary	Questionnaire to Recommend Respondents
Research Question				
What does the term, "informal teacher leadership," mean in different contexts?	X	X	X	
How do informal teacher leaders perceive themselves and their roles?	X	X	X	
How do middle school principals perceive teacher leaders and their roles?	X	X	X	X
How do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles?	X	X	X	
How, when, and why do some teachers develop into informal teacher leaders while others do not?	X	X	X	
What conditions encourage informal teacher leaders to engage in organizational citizenship behaviors, and how?	X	X	X	
What conditions discourage informal teacher leaders from engaging in organizational citizenship behaviors, and how?	X	X	X	

3.4.1   Formal, Semi-Structured Interviews

Three overarching research questions provide a framework for this study (The research questions are presented in Chapter 1 and earlier in this chapter). To address these questions, formal, semi-structured, in-depth interviews served as the primary means of data collection, and I acted as the principal data collection instrument. The general topic of informal teacher leadership reviewed in Chapter 2 represented the substantive framework for interviewing. The subjects of specific research questions listed above served as topics within the substantive frame: (a) definitions of or situations illuminating informal teacher leadership; (b) informal teacher leaders' perceptions of themselves and their roles; (c) administrators' perceptions of informal teacher leaders and their roles; (d) colleagues' perceptions of informal teacher leaders and their roles; (e) paths informal teacher leaders took to leadership; (f) conditions within the schools encouraging informal teacher leadership; (g) conditions within the schools discouraging informal teacher leadership; and (h) OCBs of informal teacher leaders. Considering these lines of inquiry helped me ask questions aimed at uncovering the abstract nature of informal teacher leadership as a phenomenon.

   With the respondents' consent, I audio-recorded and transcribed all interviews. I also transcribed the questions I answered as a participant in this study. To gather substantial data, two school principals, 10 informal teacher leaders, and five teachers who are not leaders each engaged in one, formal, semi-structured interview lasting for approximately one hour. Some of the respondents engaged in less formal, follow-up interviews of various lengths; however, none of the follow-up interviews lasted longer than 30 minutes. Follow-up interviews were conducted for the purposes of clarifying and triangulating data, and further investigating markers (Weiss, 1994).

Because I am familiar with the subject of informal teacher leadership, and because as part of my investigation I wished to discover how informal teacher leaders come to assume such positions, I had formulated interview guides. These interview guides consisted of listings of areas to be covered in the interviews along with, for each area, a list of topics or questions that together advised lines of inquiry (Weiss, 1994). Interview guides helped me to uncover and then, if necessary, report information diachronically so that I could address changes in respondents over the course of their careers (Interview guides used for this study are presented in Appendix D).

As suggested by Hatch (2002), ongoing analysis of data throughout the study provided a basis for constructing guiding questions for follow-up interviews with respondents. Although guiding questions served to initiate respondents' comments, I remained prepared to follow the leads that respondents generated within the interview contexts. Basically, I tried to notice "markers," or passing references "made by a respondent to an important event or feeling state" (Weiss, 1994, p. 77). If I was unable to remember a marker or return to the subject during an interview, then I prepared for a subsequent interview a guiding question that referenced the marker.

At no time did I prevent a respondent from commenting on a topic, even if he or she chose to speak about a topic that seemed extraneous. As per the nature of qualitative research, I remained responsible for recognizing topics by carrying into each interview a general sense of the information I wished to uncover, but I never dissuaded respondents from speaking about seemingly irrelevant topics. Although the basic frame of this qualitative study was established before I began to research, I did not want to risk an opportunity to embark upon interesting or relevant data by insisting that respondents avert their attention to the topics I deemed most

158

appropriate. Basically, I heeded Weiss' (1994) advice on conducting interviews using guiding

questions: "If I could imagine any use for the material, I would want the respondent to develop

it…For me, that possibility would be enough to justify encouraging the respondent to develop

the material" (p. 80).

In sum, I structured interview guides so that while interviewing respondents, I made

certain to ask questions that were open-ended, yet focused. My goal was to question respondents

accordingly so that I offered them direction without forcing responses that supported either the

literature reviewed or my own biases and assumptions. The table below presents the research

questions I used to frame this study, and the basic interview questions I had asked to address

each of the research questions. While researching, the questions presented in the table were

often rephrased, and additional questions may have been asked depending upon the contents of

the interviews, respondents' needs for clarification or to share particular insights, and my

recognition of markers and desire to uncover more information about a subject.

Table 23 Guiding Interview Questions Asked to Address Each Research Question

Primary Research Question and Subsequent Questions	Interview Questions Asked to Address Research Question
What does the term, "informal teacher leadership," mean in different contexts?	• How do you define "leadership"? • How do you define "teacher leadership"? • How do you perceive informal teacher leaders as individuals within the dynamic system of American public schooling? • Do you perceive informal teacher leaders as influential in terms of increasing student achievement? If so, then explain how informal teacher leaders influence student achievement. If not, then why not? • Explain the role of any classroom teacher, leader or not. • Describe the behavior or personality characteristics of a colleague whom you deem an informal teacher leader.
How do informal teacher leaders perceive themselves and their roles?	• How do you perceive yourself? • How do you perceive your role? • Describe the behaviors you exhibit that you consider "extra role" behaviors. • How do you believe other informal teacher leaders in the school perceive you? • Describe your relationship with other informal teacher leaders in the school. • How do you believe the school principal perceives you and your role? • Describe your relationship with the school principal. • How do you believe your colleagues who choose not to lead perceive you? • Describe your relationship with your colleagues who choose not to lead.

Table 23 (Continued)

Primary Research Question and Subsequent Questions	Interview Questions Asked to Address Research Question
How do middle school principals perceive teacher leaders and their roles?	• How do you perceive informal teacher leaders and their roles? • How do you perceive teachers who choose not to lead? • How do you perceive yourself? • How do you perceive your role? • How do you believe informal teacher leaders in the school perceive you? • How do you believe teachers in the school who choose not to lead perceive you? • Describe your relationship with the informal teacher leaders in the school. • Describe your relationship with the teachers in the school who choose not to lead.
How do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles?	• How do you perceive informal teacher leaders and their roles? • How do you perceive yourself? • How do you perceive your role? • How do you believe the school principal perceives you? • Describe your relationship with the school principal. • How do you believe informal teacher leaders in the school perceive you? • Describe your relationship with informal teacher leaders in the school. • How do you believe your teaching colleagues perceive you, in general? • Describe your relationship with other teachers.

Table 23 (Continued)

Research Question	Interview Questions Asked to Address Research Question
How, when, and why do some teachers develop into informal teacher leaders while others do not? • What conditions encourage informal teacher leaders to engage in OCBs ("extra role" behaviors), and how? • What conditions discourage teachers from engaging in OCBs, ("extra role" behaviors) and how?	• Why did you choose to become a teacher? • Why do you choose to act as an informal teacher leader? • Why do you choose not to lead? • Walk me through how you have come to serve as an informal teacher leader. • Tell me why, in your opinion, some teachers choose to act as informal leaders while others do not. • Why do you think informal leaders choose to engage in "extra role" behaviors? • Why do you think some teachers choose not to engage in "extra role" behaviors? • Describe the culture in this school. • Give me some examples of how the culture or conditions in this school might influence you or others to act as an informal teacher leader. • Give me some examples of how the culture or conditions in this school might dissuade you or others from acting as an informal teacher leader. • If you could ask an informal teacher leader one question, then what would it be and why would you choose to ask that question? • If you could ask a teacher who does not choose to lead one question, then what would it be and why would you choose to ask that question?

The next section of this chapter discusses the pilot interviews conducted; these pilot interviews not only served as practice for this formal study, but they also allowed me to test a system of coding and sorting applicable to this research. The specific ways in which data were analyzed are described in Section 3.4.1.2.

3.4.1.1 Pilot Interviews

During February and March, 2008, six pilot interviews were performed to field test a draft of an interview guide. Although this research was not approved by the University of Pittsburgh's Institutional Review Board, the pilot interviews did ensure the functionality of an interview guide I intended to use during this study. Conducting pilot interviews also afforded me the opportunity to practice using qualitative research methodology to gather, sort, and code data, and present findings in the form of analytic memos. Finally, performing pilot interviews helped me to learn what Weiss (1994) cautioned against: "Focusing closely on the guide, at the cost of attention to the respondent and the flow of the interview, is always a mistake" (p. 48). Thus, as a researcher, I was prepared to concentrate attention on matters on which the respondents especially are able to report even at the cost of sparing other topics. This approach produced better, more authentic data than if I were to plod adherence to the interview guides.

3.4.1.2 Data Analysis

Upon completion of each interview, I transcribed (put into hard copy) all audio-recorded data by using traditional methods of word processing. While reading the transcribed data during the first cycle of coding (Saldana, 2009), I established "coding categories" (Weis, 2004). Weis defined coding categories as "labels through which the data could be chunked and analyzed" (p. 188). Extending Weis' definition of coding, Saldana (2009) explained: "A code in qualitative inquiry

is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, or evocative attribute for a portion of language based…data" (p. 3). As a qualitative researcher and member of the group being studied, the data were filtered through my eyes as I perceived it; however, as Weis explained, "data have to 'speak' to a category before it is established as one" (p. 188).

The coding categories that emerged from interviews serve as empirical data that reinforced the theoretically driven codes – labels that were derived from the specific research questions driving the study and the interview questions asked of respondents. All coding categories stemmed from data: The theoretical codes (listed below in Table 24) originated as a result of reviewing literature about teacher leadership, organizing research questions, and anticipating the data that might emerge. The more specific coding categories presented in Table 25 were developed from actual data gathered to address the research questions. Although the anticipated and actual theoretical codes were similar, some different and additional codes surfaced as research was conducted. Table 25 presents the actual codes used to analyze data, as well as the research questions that prompted the development of the codes.

Table 24 Research Questions, Researcher's Assumptions, and Anticipated Theoretical Codes

Research Question	Researcher's Assumption	Anticipated Theoretical Code(s)
What does the term, "informal teacher leadership," mean in different contexts?	Teacher leadership cannot be defined universally because it has different meanings in different contexts. Informal teacher leaders understand teacher leadership in various ways as determined by their personal experiences.	Definitions of Teacher Leadership
How do informal teacher leaders perceive themselves and their roles?	The ways in which their colleagues and supervisors perceive informal teacher leadership influences the ways in which informal teacher leaders perceive themselves and their roles. For informal teacher leaders the task of improving student achievement becomes secondary to circumventing barriers and dealing with the micro-politics of schools if administrators and colleagues are not supportive of their willingness to assume leadership responsibilities.	Informal Teacher Leaders' Perceptions of Self Informal Teacher Leaders' Perceptions of Their Roles (as related to increasing student achievement)
How do school principals perceive informal teacher leaders and their roles?	School principals favorably perceive informal teacher leaders as stewards of change who increase student achievement.	School Principals' Perceptions of Informal Teacher Leaders School Principals' Perceptions of Informal Teacher Leaders' Roles (as related to increasing student achievement)

Table 24 (Continued)

Research Question	Researcher's Assumption	Anticipated Theoretical Code(s)
How do teachers who are not informal leaders perceive informal teacher leaders and their roles?	Teachers who are not informal leaders perceive informal teacher leaders negatively and as having roles unrelated to student achievement.	Colleagues' Perceptions of Informal Teacher Leaders Colleagues' Perceptions of Informal Teacher Leaders' Roles (as related to student achievement)
How, when, and why do some teachers develop into informal teacher leaders while others do not?	Teachers who develop into informal leaders do so early in their careers, keep their focus on improving student achievement, and do not perceive OCBs as extra-role behaviors.	Development of Informal Teacher Leaders
What conditions encourage informal teacher leaders to engage in OCBs, and how?	Supportive school administrators and colleagues encourage teachers to lead informally and engage in OCBs.	Conditions that Encourage Informal Teacher Leadership (and therefore OCBs)
What conditions discourage teachers from acting as informal teacher leaders or engaging in OCBs, and how?	Unsupportive school administrators and colleagues discourage teachers to lead informally and engage in OCBs.	Conditions that Discourage Informal Teacher Leadership (and therefore OCBs)

Table 25 Actual Codes Used to Analyze Data as Generated by Research Questions

Primary Research Question and Subsequent Questions	Actual Theoretical Codes that Emerged Via Interviews
What does the term, "informal teacher leadership," mean in different contexts?	- Descriptions of leadership, in general - Descriptions of informal teacher leadership - Behaviors of informal teacher leaders - Respondents' ideas regarding what behaviors constitute bare minimum teaching practices - Link between informal teacher leadership and student achievement
How do informal teacher leaders perceive themselves and their roles?	- Respondent's emotion(s) - Respondent's perception of self - Relationships among informal teacher leaders - Relationship between informal teacher leader(s) and administrator(s) - Relationship between informal teacher leader(s) and teachers who do not lead - Informal teacher leaders' and non-leaders' perceptions of each other - Respondent's link to student achievement
How do middle school principals perceive teacher leaders and their roles?	- Respondent's emotion - Respondent's perception of self - Respondent's relationship with informal teacher leaders - Respondent's relationship with teachers who do not lead
How do teachers who are not informal teacher leaders perceive informal teacher leaders and their roles?	- Respondent's emotion - Respondent's perception of self - Relationship between teacher(s) who do not lead and administrator(s) - Relationship between informal teacher leaders and teacher(s) who do not lead - Informal teacher leaders' and non-leaders' perceptions of each other

Table 25 (Continued)

Primary Research Question and Subsequent Questions	Actual Theoretical Codes that Emerged Via Interviews
How, when, and why do some teachers develop into informal teacher leaders while others do not? • What conditions encourage informal teacher leaders to engage in OCBs ("extra role" behaviors), and how? • What conditions discourage teachers from engaging in OCBs, ("extra role" behaviors) and how?	• Informal teacher leader(s) path(s) to leadership (internal and external influences) • Why or why not develop into an informal teacher leader (intrinsic and extrinsic motivators) • Aspects of school culture that promote • Aspects of school culture that hinder • Leaders' advice for administrators

Once transcribed, I first coded each interview by hand on hard copy because, according to Saldana (2009), "there is something about manipulating qualitative data on paper and writing codes in pencil that gives you more control over and ownership of your work" (p. 22). As the first cycle of coding continued, I kept a record of the emergent codes (listed above in Table 25) in a separate file as a codebook – a compilation of the codes, their content descriptions, and a brief data example for reference. This practice was helpful when at times, interview segments were assigned multiple codes. For example, during one phase of an interview, a respondent spoke to the path he took to become an informal teacher leader as well as the conditions within his work environment that encouraged his willingness to assume leadership responsibilities. In this case, his words were coded to address both intrinsic and extrinsic factors that encourage informal teacher leadership, and I was able to reference my codebook to ensure that I had assigned the appropriate codes to this data.

Simultaneously, each transcribed interview was interpreted on hard copy. Coding and interpreting data initially on hard copies helped me to identify additional coding categories that emerged as data was interpreted during this first cycle of analysis. As with coding, the initial

interpretation of data began upon transcription of the first interview. The interpretation of data gathered early in the research informed the questions I asked during subsequent and follow-up interviews. The template used to code and interpret hard copies of transcripts is displayed in Appendix E.

Once I felt the codes were fairly well established from my initial hard copy work, the transcripts were coded and interpreted electronically via traditional word processing methods. Coding and interpreting was done in cycles because, as Saldana (2009) posits, coding is a cyclical – not linear – process. During each cycle, new interpretations of data informed subsequent codes used and interpretations made. Whereas I allowed the codes to emerge during the first cycle, I worked to classify, prioritize, integrate, synthesize, and conceptualize the coes during later cycles.   Coding cycles continued until the major themes or concepts presented in Table 25 surfaced, and I was able to use the literature explored either to support or challenge the themes or concepts that emerged (Saldana, 2009).

During the process of coding and interpreting data, folders (titled according to theoretical codes) and files (titled according to coding categories that emerged as a result of research) were created so that data segments could be "transferred" to the appropriate folders and files. Hard copies of folders and files also were designed to hold printed data segments that were organized into appropriately labeled manila file folders. This process of physically manipulating the data enabled me to consider the chunked data carefully; sometimes, reviewing printed data in lieu of electronic data allows for me to interpret findings more clearly or differently. However, copies of original transcripts were kept intact so that I could move easily between bits and pieces of coded and interpreted data, and the larger context from which the data snippets originated.

Two forces drove the method of data analysis: (a) intense technicality with respect to the logic of empirical study, and (b) insights I gained throughout the meticulous process of acquiring, reading, interpreting, coding, sorting, and analyzing data. As Lois Weis (2004) explained, "While coding categories are not established based on the whim of an investigator and coding itself is not done solely through a series of imaginative moves, it is also the case that without such imagination, scholarship falls flat" (p. 189). As is the case with qualitative research, the insights I gained regarding the data I collected, as well as the meaning I made as a result of acting as a participant in this study, not only influenced my findings, but the way in which I presented them as well. Coupled with the knowledge I have acquired from extensively reviewing the literature on teacher leadership, my own interpretations – the "imaginative moves" – allowed me to weave together a final product based upon the work of many.

3.4.2 Personal Narratives

Once respondents were interviewed, they were given the option of writing a personal narrative – a short vignette – about their thoughts and feelings regarding the interview. From the pilot study, I learned that after interviewing, respondents almost always remembered key points on which they later commented. Sometimes, this data significantly influenced the direction of the pilot study and specifically, the types of questions I might have asked during subsequent interviews. Hence, for this study, I wished to offer respondents a formal opportunity to reflect upon the interviews and present additional information. Although most respondents declined the opportunity to author a personal narrative, the small amount of data generated from respondents' personal narratives was coded, interpreted, sorted, and analyzed just like data obtained from in-depth interviews (The specific process of data analysis is discussed above).

3.4.3   Follow-Up Interviews

Follow-up interviews as a procedural possibility were built into this study.   As data were gathered during formal, in-depth interviews, I sometimes recognized a need to conduct follow-up interviews based upon educators' responses to questions.   While transcribing initial interviews, I may have noted an issue requiring additional clarification or probing, thus necessitating a follow-up interview.   And once they read transcripts, respondents may have requested a follow-up interview to clarify comments they deemed inaccurate.

Interview guides for follow-up interviews were used to ensure that respondents spoke to the issues under investigation.   However, interview guides, as well as the follow-up interviews themselves, were less formal and took less time than initial interviews.   All follow-up interviews were transcribed, and all transcribed data was coded, interpreted, and analyzed as explained above.   Follow-up interviews continued as needed throughout the study as per my discretion and respondents' consent.

3.4.4   Methods of Triangulation

Several methods of triangulation were incorporated into this study in order to add credibility. Since only qualitative research methodology was used to gather data, triangulation of multiple data sources within the same research methods was employed.

For example, member checks occurred so that after each interview was transcribed, respondents had an opportunity to examine the transcripts for accuracy.   Scrutinizing the transcripts helped respondents recall the events of the interview, clarify any information they reported that once transcribed appeared invalid, and add germane facts.   Based upon

171

respondents' feedback, I made changes and again invited them to review transcripts as a method of triangulation. Although some respondents declined the opportunity to review the transcribed data, the process of member checking continued until respondents who did review transcripts were comfortable with the transcribed data. For the purposes of the study, I promised to use only data that respondents deemed accurate and appropriate.

No more than seven days passed between the actual interviews and respondents' receipt of transcripts for appraisal. However, immediately following interviews, I encouraged respondents to generate and triangulate data by authoring personal narratives. My contention was that writing might help them to expand upon critical points to which they might have spoken during interviews, or to offer additional information after the interviews concluded. I also had invited respondents to write about the interview process so that I might use the information they offer to frame subsequent interviews. Although only two respondents chose to author a personal narrative, this second method of triangulation was embedded in the study to increase the credibility of research due to participants' active reflection upon the interviews in terms of both methodology employed and the data they had offered.

Next, data gathered was reviewed against existing theories and literature addressed in the second chapter. Examination of espoused versus enacted theories of informal teacher leadership assisted in validating the study, and in the interpretation and analysis of data. Essentially, I learned that my findings substantiated the literature reviewed, and that the literature did, indeed, add credibility to my findings.

Also throughout this study, data was shared with experts in the field who offered their interpretations. For example, I work with a number of colleagues who, according to the definition of informal teacher leadership used for the purposes of this study, can be categorized

as "informal teacher leaders." Since I did not invite them to participate as respondents in this study, I instead asked them to read and interpret data. The meanings they made as a result of examining the data and reflecting upon their respective practices offered me a glimpse of the phenomenon under study from a different perspective. Additionally, fellow qualitative researchers with whom I frequently collaborate provided their insight on a regular basis. During bi-monthly meetings of a "dissertation writing group" to which I have belonged throughout the duration of this study, I have shared my struggles and small victories along the way. Since all group members also are qualitative researchers in the midst of formal studies, they offered their guidance and advice in regard to research methodology.

As another means of triangulation, I began interpreting and analyzing data immediately upon transcribing the first interview instead of waiting until all interviews were transcribed. Examining data over the entire course of the study illustrated consistency in certain findings and therefore increased my confidence in the results. Conversely, when data diverged, windows to a stronger understanding of informal teacher leadership opened. As explained above, I desired to gain a more thorough understanding of myself as an informal teacher leader by inferring from the experiences of others. Carefully and thoughtfully interpreting and analyzing data over time permitted me to examine findings from a variety of angles to inform this phenomenological study of informal teacher leadership.

Finally, follow-up interviews were used as a method of triangulation. As the need arose, and if respondents consented, follow-up interviews were conducted in order to glean more data or to clarify existing data. The nature of these follow-up interviews is described in detail above.

The next four chapters present an analysis of the phenomenon under study.

4.0   REPORT OF FINDINGS: HOW SCHOOL COMMUNITY, CULTURE, AND SIZE INFLUENCE INFORMAL TEACHER LEADERSHIP

Chapters 4 through 7 report on the phenomenon of informal teacher leadership as I understand it after having conducted this study. Informal teacher leadership appears to be situational; it manifests differently among contexts. The phenomenon is abstract, dependent upon countless intrinsic and extrinsic variables, and unique to each school environment. After thoroughly analyzing the data gleaned from research, I realize that I am left with far more questions than answers. The purpose of this chapter, as well as the next three chapters, is not to explain or define informal teacher leadership as it exists universally, for that would prove to be an impossible task. Instead, I devote Chapters 4 through 7 to a discussion of how I perceive informal teacher leadership after examining the phenomenon in two diverse school environments, and engaging in it in a third school environment. Throughout the chapters, I present my findings. To interpret the data and address the research questions, I reference the literature reviewed in Chapter 2, as well as my own experience as a member of the group under study.

This chapter serves three purposes. First, it introduces the respondents so that the reader may reference the information as he or she reads the report of other findings. Knowing where each respondent teaches, as well as his or her assignment and years of experience, may help the reader understand how I interpreted the data presented. It also may assist the reader in coming to

his or her own conclusions about informal teacher leadership. Next, this chapter describes the school environments where respondents work. The cultures of the sampled schools significantly influence how informal teacher leadership manifests in those schools. Hence, learning about each school's culture may help the reader realize why I interpreted findings as such in the subsequent chapters. Finally, Chapter 4 explores the potential influence of school community, culture, and size on informal teacher leadership. Although I recognize that several factors other than school community, culture, and size influence informal teacher leadership, I provide evidence that the smaller school environment studied might be more conducive to informal teacher leadership. The next section of this chapter presents the respondents, the schools in which they work, and their specific responsibilities.

4.1   THE RESPONDENTS

School principals, informal teacher leaders, and teachers who choose not to lead served as respondents for this study. The following table presents specific information about each respondent.

Table 26 Respondents and Their Formal Assignments

Respondent	Sub Group	School	Years Experience (Years There)	Formal Assignment
Anna	ITL	Smallville	9 (4)	Physical education and health, grades 2 – 12
Bill	Non-leader	Smallville	10 (8)	Physical education, grades 6 – 8
Bob	Non-leader	Smallville	6 (5)	Physical education, grades 6 – 8
Chloe	ITL	Smallville	10 (5)	Math, science, and social studies, grades 6 - 8
Christina	Non-leader	Smallville	5.5 (5)	Special education, grade 6
David	ITL	Middleton	23 (22)	Science, grades 7 and 8
Dex	Non-leader	Middleton	8 (7)	Math, grades 7 and 8
Ella	ITL	Middleton	2 (2)	English, grades 7 and 8
Gabrielle	ITL	Smallville	6 (4)	Language arts, grade 6
George	ITL	Smallville	6 (5)	Middle school social studies during interviews/current assistant principal
James	Principal	Middleton	10 (4)	School leader
Joan	ITL	Middleton	19 (19)	English and reading, grades 6 – 8
Joe	ITL	Smallville	10.5 (10.5)	Business, grades 6 – 12
Lydia	ITL	Smallville	5 (4)	Art, grades 6 – 8
Mark	Non-leader	Middleton	30+ (30+)	Social studies, grade 7 and 8
Steve	Principal	Smallville	14 (3)	School leader

As explained in Chapter 3, school principals recommended the informal teacher leaders and non-leaders for this study. Although I never told respondents which sub-group they represented (Steve and James obviously knew they represented "school principals."), some of the informal leaders and non-leaders led me to believe that they were well aware of why their principals recommended them. When I contacted respondents prior to the first interview, I defined informal teacher leadership for the purpose of this study, and I explained my reasons for conducting the study. During interviews, some informal teacher leaders commented that they felt "honored" to know their principals recommended them as respondents. Additionally, some non-leaders verbalized that they "know why" their principals suggested they speak with me.

Both school principals recommended the same number of potential respondents, and I sent an invitation to everyone they recommended. Nevertheless, I had a much easier time recruiting respondents from Smallville than from Middleton. Overall, more informal teacher leaders than non-leaders were willing to interview, and most of them hail from Smallville. Likewise, more non-leaders from Smallville than from Middleton agreed to participate, but I suspect this is because Steve – Smallville's principal – graciously offered to permit the non-leaders to engage in interviews on site during contracted hours. In sum, more informal teacher leaders than non-leaders were eager to participate in this study. Also, most respondents work at Smallville.

The following information describes the school communities and cultures of Smallville and Middleton. These findings were gleaned from interviews with respondents. Woven throughout the presentation of data are my interpretations that invite the reader to consider why informal teacher leadership seems to occur more readily in Smallville.

177

4.2 HOW SCHOOL COMMUNITY, CULTURE, AND SIZE INFLUENCE INFORMAL TEACHER LEADERSHIP AT SMALLVILLE

Whereas some teachers in larger middle schools may avoid assuming leadership responsibilities because they know that eventually, another colleague may be appointed or paid to lead formally, Smallville's teachers willingly assume roles outside of those specified in their teaching contracts because, as Steve explained, "That's just how things are done here."

"Here" is a very small suburban school district in Western Pennsylvania that graduates approximately 45 to 50 students each June. The entire school district, which enrolls about 550 students, is housed in one building, making it possible for educators to interact with students for several years. Some teachers are assigned to teach across grade levels, and therefore have instructed some of the same students for more than one school year. All of Smallville's respondents either stated or alluded to the notion that educators have an opportunity to form close, personal bonds with their students because the small size of the school district invites an intimacy that may not be present in a larger school district. According to Steve, "Everyone knows everyone, and everyone knows everyone's mother, grandmother, brother, uncle, and cousin."

Smallville is surrounded by much larger school districts. Throughout the past 10 years, local politicians and school board members have considered merging Smallville with a neighboring school district. According to Joe, an informal teacher leader who attended Smallville and lived in the community his entire life, tax payers who live in neighboring school districts fight to keep Smallville's students from "infiltrating their schools." Joe believes that stakeholders in the larger school districts that surround Smallville "think less of the students because they don't have a lot of money." Joe claims that because of neighbors' perceptions of

Smallville, "some students and teachers maintain a 'loser mentality' that comes out as, 'Why does it [hard work] matter? We work at *Smallville*."

Joe spoke about another factor that makes Smallville unique – the low socioeconomic status of many of its students. The school district is situated in a low-income area filled primarily with blue-collar families that have lived in the surrounding borough for generations. The community, which Steve described as one "of lower socioeconomic status," is comprised of families with a median income of $32,321. According to the United States Census Bureau, in 2000, 6.4 percent of families and 9.7 percent of the population in this community were below the poverty line (This is the most current information because the results of the 2010 census have not been published). Steve disclosed that 70 percent of his students qualify for either free or reduced-priced lunches, which indicates that many students of Smallville hail from low-income families.

No matter the exact number of students whose families are poor all respondents interviewed regard the entire student population of Smallville as "unfortunate." According to George, an informal teacher leader, the vast majority of parents are blue-collar workers who rent their homes. To George, renting in lieu of owning a home is a sign of an unfortunate existence. Gabrielle, another informal teacher leader, commented that most parents "just live off welfare," and that "maybe in a class of 25, we have four parents who have a professional job, and who maybe go outside of our community to work." Steve and all interviewed informal teacher leaders clearly explained that a number of parents struggle to provide materially for their children.

In this particular small school setting, both the size of the school and the socioeconomic status of students – whether actual or perceived – appear to drive the behaviors of informal

teacher leaders. These issues of school size and community appear interconnected and significantly influence Smallville's culture. This information is explored below.

First, in regard to school size as a factor influencing informal teacher leadership, Steve drew upon personal experience as he described why informal teacher leadership might flourish more easily in a small school setting:

I bet you that in a bigger school system it's a lot more difficult to be an informal teacher leader…I've worked in a bigger one…and it would be more difficult to become an informal leader in a larger school district. I think…because they have so many formal leaders, I don't think [informal teacher leaders] would surface as easily…I don't think the principal would be able to identify them as quickly as, uh, the principal in a smaller school district just because the roles in a smaller school district, they – the informal teacher leaders – have quite a few more opportunities because I think in a smaller school district the formal leaders aren't around…In a bigger school district, you have the department heads that are typically the very formal teacher leaders where I'm not sure another teacher in that department would be able to take on a different role [from the role the department heads already assume].

In sum, Steve believes that Smallville's size makes it easy for him to recognize potential leaders. He also purports that since Smallville does not have the budget to pay teachers to lead formally, more informal leaders surface because "things just need done regardless of whether or not they can be paid." Simply, Steve identifies informal leaders and expects them to assume extra responsibilities for no compensation. Steve's expectation of his teachers to lead and set goals related to student achievement, as well as his acknowledgement of a principal's need to identify teachers with the potential to lead informally, is consistent with Elmore's (2000)

recognition of the importance of distributed leadership in schools. Steve's mentioning of certain teachers' reluctance to overshadow formal leaders of departments in larger schools substantiates the findings of Barth (2001), and Johnson and Donaldson (2007), who reported that teacher leadership is often suffocated by colleagues who honor the egalitarian norms of the profession.

Apparently, the practice of teaching has been somewhat deprivatized in Smallville so that collaboration is the model. Teachers cooperate, share, and extend themselves beyond the terms of their contractual agreements for the sake of their students' education. Seemingly, the informal teacher leaders of Smallville wish to help their students break the cycle of low socioeconomic status by meeting their basic needs and giving them their best efforts as educators.

Next, in this small school setting, the low socioeconomic status of the community appears to promote the behavior of informal teacher leaders. The collegial culture of Smallville seems to stem from teachers' willingness to collaborate for the purpose of helping their students break the cycle of low socioeconomic status. Consistent with Barth's (2006) report that teacher leadership thrives in school cultures where collaboration among colleagues is encouraged and supported, all of Smallville's informal teacher leaders interviewed acknowledged a culture of collaboration among the vast majority of teachers. However, they reported a reason for collaboration that was not presented in the literature reviewed: in Smallville, collaboration among teachers is a necessity, but not because the school lacks educational resources for teachers to provide their students with an adequate education. As explained below by respondents, the students' needs are perceived as extensive. Thus, they attest that they have no choice but to collaborate if they wish to meet many of their students' physical and emotional needs.

For example, Anna summarized the contention of those interviewed:

I realize that these kids have more opportunities the more that I give. The more

181

that I step up to the plate to do above and beyond my contract, the more these kids benefit…For some of these kids, the school is the only safe place they have. You know, so that's why I'll stay after school if the kids want to do something extra…I'll burn myself out, but I feel like I'm giving these kids a better opportunity to do things…These kids have these talents and I'm just shocked that their parents don't show up for this stuff.

Throughout Anna's interview, she spoke with sadness in her voice; this sadness was even more apparent whenever she told stories of her students – some, according to her, not only hail from families of low socioeconomic status, but who also have parents who fail to show an interest in them. All of Smallville's educators interviewed perceive a disconnection between families and the school, as well as families' devaluing of education, in general. For example, some of the respondents shared:

- Some of our kids, they don't come from the right background; they come from different situations…I mean, sometimes, what they see is, uh, pretty crazy…'cause a lot of these kids, they come from situations where education is not valued…Uh, open house…sometimes it's a ghost town. It's almost embarrassing. (George)

- I don't think [the students'] parents are very well versed in [personal finance], so if they're in trouble, our students definitely model what's happening in their homes, so I feel I need to start somewhere. And actually what I'm hoping for is that they turn around and teach the parents so a lot of this information I'm disseminating I'm making extra to go home to the parents. (Joe)

- Our culture…has a struggle that most districts don't have…we have a very large majority where they don't receive the proper…culture at home where most of us in the world

182

receive. For instance, we have parents that do not even know when they come in for open house what grade their kid's in. (Gabrielle)

In some instances, informal teacher leaders commented on parents' supposed inability to meet their children's physical and emotional needs. These educators recognize that if students are expected to improve academically, then their basic needs must be met first because no learning is going to occur if they are hungry, emotionally distraught, or lonely (Maslow, 1943):

- I think some teachers knowing the background of these students, knowing where they come from – there is no dad; the mom's a heroin addict; sometimes, they're with the grandma and sometimes, they're not – that kind of motivates them to say, "I want to go to this tonight and support so and so because nobody else will be there for them." (George)

- [The students] don't have a lot of outside experiences…They don't have anything at home…It makes me think I want to go back and keep giving them these experiences that they wouldn't have otherwise. (Lydia)

- I have some students who I recognize that their biggest accomplishment of the day is they made it to school. (Joe)

- It's almost like we have to bring [a culture] out in the kids because they don't have a culture. (Gabrielle)

Hence, school size and a sense of community motivate teachers in Smallville to lead informally for the sake of their students' physical and emotional well-being more so than for their academic achievement. Respondents mentioned that they support each other's efforts to assist students in ways many teachers in more affluent school districts may not. For example, they: (a) buy or donate coats for students during winter; (b) feed students snacks after school; or

(c) cheer for student athletes during their games. One informal teacher leader promised, "Even the slackers around here (This informal teacher leader described "slackers" as those colleagues who work no longer than their contracted hours) – and there aren't too many – care about kids!" As Steve summarized, and all informal teacher leaders interviewed had substantiated:

> We care about these kids. We're going to do whatever it takes to get them through knowing that they might not be at the top of the academic scale. But, they're gonna get something to eat here, and they're gonna be treated well. That is just part of our culture.

> What does not appear to be part of Smallville's culture is teachers' collective willingness to collaborate for the purposes of professional development. Unless informal teacher leaders' efforts are tangible and directed toward their students' physical or emotional well-being, non-leaders do not seem supportive. This aspect of Smallville's culture is explored at length in Chapter 7.

> In summary, the culture of Smallville is affected by: (a) the school's small size; (b) the actual or perceived socioeconomic needs of its students; (c) Steve's willingness to distribute his leadership responsibilities, and his ability to identify potential leaders; (d) informal teachers leaders' readiness to lead informally in order to meet their students' basic or education needs; and (e) teacher-student relationships that last for more than one year. To me, it seems impossible to separate any of these factors when considering why, in terms of this study, more teachers appear eager to lead informally in this small school environment.

4.3   HOW SCHOOL COMMUNITY, CULTURE, AND SIZE INFLUENCE INFORMAL TEACHER LEADERSHIP AT MIDDLETON

Middleton is a medium sized, suburban middle school in Western Pennsylvania with between 500 and 800 students. Although Middleton is considered medium sized for the purposes of this study, both its physical structure and student population are substantially larger than that of Smallville, where the entire school district is housed in one building. Middleton serves only as a middle school so that students in grades six through eight spend three years there. Unlike many of Smallville's teachers who teach across several grade levels, most of Middleton's teachers instruct one grade level, and therefore interact with their students for only one school year.

Additionally, the community that surrounds Middleton is quite different from that which surrounds Smallville. Whereas 70 percent of Smallville's students qualify for either free or reduced-priced lunches, only 23.4 percent of Middleton's students qualify for assistance. According to the Local School Directory (2010), the median household income of the surrounding community is $41,000 – almost $10,000 higher than that of households in the community that surrounds Smallville.

As in Smallville, informal teacher leadership in Middleton might be influenced by school size or the type of community present. However, the socioeconomic status of the surrounding community does not appear to drive informal teacher leadership in Middleton as directly as it does in Smallville. During the interviews conducted for this study, no respondents mentioned the socioeconomic status of Middleton's students; none acknowledge that students' perceived or actual physical or emotional needs influence their approach to educating students. Perhaps teachers in Middleton may not feel as if they have to assume informal leadership responsibilities for the sake of their students because they do not perceive their students as needy. If this is the

case, then Middleton students' higher socioeconomic status might indirectly drive teachers' perceptions of their roles, and thus, informal teacher leadership. Regardless, additional factors certainly affect informal teacher leadership in this school. Those factors gleaned from the data are presented below.

Middleton's culture does not appear to be based upon an overarching sense of collegiality among teachers. According to James, the school principal, teachers appear reluctant to assume informal leadership responsibilities because they sometimes "get grief for doing extra." James also acknowledged that occasionally, he needs to manipulate his teachers to lead: "A lot of times, it feels like I'm 'pulling teeth.' A lot of times I feel that I have to be manipulative to get something done…For instance, I have gone to teachers and asked them to speak to other teachers about stepping up."

Apparently, James wishes to distribute his leadership responsibilities to teachers with the capacity to lead because he recognizes the importance of distributing responsibilities to promote and sustain informal teacher leadership (Elmore, 2000; Spillane et al., 2001). However, James reported that he struggles to promote informal teacher leadership because of the culture present in Middleton. James detailed the school's culture, and told a story of relational bullying among colleagues that almost prevented a teacher from leading informally:

> I think there's probably some jealousy [among teachers]…This building in particular likes to joke around and tease each other. I think the middle school staff takes on the persona of the kids they work with, so there should be some joking. And I'm ok with joking but they are harsh and I think some of the, um, teasing is kind of like our kids being teased. I think some of our teacher leaders get teased…I have an example of a teacher who, um, is really interested in [a local school district's], um, policy where they,

186

they have a district-wide look at, um, failing, and a kid who takes a test has numerous tries at that same test…And this teacher – with mine and the superintendent's help – arranged a visit to [the local school district] to go talk to those teachers…Um, she had a hard time. She was almost bullied to the point where she wasn't gonna go on this trip…It was like, "Why are you doing this? We're not gonna do that here!"

The culture that James described is adversarial (Barth, 2006) and balkanized (Hargreaves, 1994) so that teachers do not work collaboratively or encourage each other, but instead, gain identity by working in territorial groups (Hargreaves, 1994). In this particular school environment, two of the territorial groups are comprised of those who desire to go above and beyond for the sake of their students, and of those who bully informal teacher leaders. Although when referring to the teacher noted above James discredited her as a leader because, as he upholds, "a true leader wouldn't have cared [about colleagues' opinions of her actions]," he does, however, acknowledge that Middleton maintains a culture that is not conducive to the growth of informal teacher leaders. James described the work of a teacher whom he deems an informal leader and noted, "Other teachers have gone to him and have questioned why he's [leading informally] and say that it makes them look bad." James also qualified, "I know teachers who did not take things on because of their fears – who have not stepped up because they don't want to deal with [the relational bullying among colleagues]."

Ella, an informal teacher leader, spoke at length about her colleagues' behaviors that illustrate the type of culture present at Middleton, and thus substantiated James' description of Middleton's balkanized culture (Hargreaves, 1994). Ella referred to a specific group of male teachers who choose not to lead:

187

[The non-leaders] like that feeling of dominance…It's like there's a clan of them…They feel a sense of power being a [non-leader]. They're constantly in the halls between classes. There is always this cackling going on between them. They're definitely the "Boys' Club." They are the same ones who laugh at new ideas….They are very interested in just the same old stuff – getting through the day – and talking about when they are going to retire…One time, I saw one of them go out on a limb to try something new – do something extra. The others in the group made so much fun of him that he just quit trying.

Ella described a type of school culture that Deal and Peterson (2004) consider "toxic" because it is not conducive to the growth of informal teacher leaders. Although the relational bullying among Middleton's teachers is explored in greater detail in Chapter 7, Ella's report of the "Boys' Club" members squelching a colleague's desire to lead elucidates James' contention that some of Middleton's teachers are hesitant to "step up."

Although the balkanized (Hargreaves, 1994) and toxic (Deal & Peterson, 2004) culture may be impacted by Middleton's larger size and enrollment so that teachers might not know all students and colleagues personally – a factor that often contributes to a sense of community in schools (Barth, 2006; Hargreaves, 1994), and seemingly, in Smallville – a number of other factors contribute to the culture of Middleton. These factors are discussed in the following three chapters. Nevertheless, based upon data generated as a result of this study, the number of informal teacher leaders in the schools sampled appears to be affected by school size and educators' perceptions of students' needs.

In sum, Middleton teachers' willingness to lead informally does not appear to be driven by their perceptions of students' physical or emotional needs. Instead, the balkanized

(Hargreaves, 1994) and adversarial (Barth, 2006) culture present in Middleton – which may be affected by its larger size – seems to influence informal teacher leadership more directly than any other factor.

4.4   A SUMMARY OF HOW SCHOOL SIZE AND COMMUNITY MAY INFLUENCE INFORMAL TEACHER LEADERSHIP

Smallville – the smallest school studied – provides the only environment where informal teacher leadership thrives. Perhaps this is because of Smallville's small size, the needs of its students, or its culture so that teachers who choose to lead are basically supported by their colleagues as long as they can justify – through tangible means – that their leadership positively influences students. Whether the size of Smallville or the needs of the surrounding community influence the culture among teachers in the school, it is this sense of collegiality that seems to promote informal teacher leadership more so than any other factor.

For Middleton, its larger size may attribute to the fragmented culture that appears to hinder informal teacher leadership there.   Perhaps teachers in larger schools struggle to bond as a faculty, and therefore may not feel the need to support each other. I witness this phenomenon at work; the school building is so large that for months at a time, I might not see or interact professionally with colleagues who work at the opposite end. Over the years, some of these colleagues, whom I do not know personally, have displayed animosity toward me for what appears to be my willingness to lead. However, if given the opportunity, these same colleagues might report that I do not support them. I find it difficult to show them direct support when I have no first-hand knowledge of the informal leadership responsibilities they assume.

189

Therefore, school size and the needs of the surrounding community quite possibly drive informal teacher leadership indirectly as school size may influence the type of school culture in which informal teacher leaders flourish. Regardless of why their school cultures are as such, the cultures of Smallville and Middleton appear to influence informal teacher leadership most directly.

In the next three chapters, I present a discussion of the phenomenon of informal teacher leadership based upon the three, overarching researching questions driving this study, as well as common analytical themes that emerged from the research. Findings are separated according to the research questions, and then according to the analytical themes that surfaced as data were coded.

Because the possibility of school size and community as influences on informal teacher leadership was detailed in this chapter, the data analyzed in the next three chapters are not separated to reflect the settings in which it were collected. Also, data are not divided according to school because most data detailed in the next three chapters were consistent among school environments. However, in Chapter 7, some data are categorized according to the respondents' perceptions of their schools' cultures. Also, in many instances, data are organized according to the group of respondents that presented the data: (a) school principals, (b) informal teacher leaders, or (c) teachers who choose not to lead.

Thus, the following discussion presents informal teacher leadership from the perspective of school principals, informal teacher leaders, and teachers who choose not to lead informally. Woven throughout the chapter are my interpretations of data and references to literature reviewed in Chapter 2.

5.0 REPORT OF FINDINGS: THE MEANING OF THE TERM "INFORMAL TEACHER LEADERSHIP" IN DIFFERENT CONTEXTS

Because informal teacher leadership is difficult to define (Lambert, 2003), and therefore appears to be situational, I attempted to investigate the phenomenon as it manifests across various contexts to learn of commonalities and disparities among such contexts. The analysis in this chapter presents the commonalities and disparities I recognized, and is divided according to the following common themes that emerged from the data gathered to address the first research question: "What does the term, 'informal teacher leadership,' mean in different contexts?" The common analytical codes, or themes, that surfaced through analysis are: (a) descriptions of leadership, in general; (b) descriptions of informal teacher leadership; (c) behaviors of informal teacher leaders; (d) respondents' ideas regarding what behaviors constitute bare minimum teaching practices; and (e) the perceived link between informal teacher leadership and student achievement.

Chapter 5 presents how the interviewed principals, informal teacher leaders, and non-leaders perceive leadership. Principals and informal teacher leaders regard "leadership" as guiding others by establishing collegial relationships with them, and by modeling appropriate behavior. Conversely, non-leaders equate leadership with management; they believe leaders guide followers by directing or demanding their behaviors.

Linked to the overarching subject of "leadership" are respondents' notions of informal teacher leadership, and specifically, the types of behaviors that constitute extra-role behaviors (Organ, 1990). Although all respondents suggest similar examples of informal leadership behaviors, the principals and informal teacher leaders deem those behaviors "bare minimum teaching practices." Essentially, they recognize informal leadership behaviors as "extra," yet assert that every classroom teacher *should* demonstrate behaviors beyond those specified as per the terms of their contractual agreements. On the contrary, the non-leaders jointly uphold that engaging in only mandated behaviors is acceptable. Section 5.1 discusses respondents' descriptions of leadership in general.

5.1   RESPONDENTS' DESCRIPTIONS OF LEADERSHIP

To recognize informal teacher leadership in different contexts as defined by respondents, I first needed to discover how respondents understand leadership in general. According to respondents, the term, "leadership," means "providing guidance." While defining "leadership," every respondent used the word "guide." They suggested that "leaders guide followers," or that "leaders offer guidance to others." However, respondents' ideas of the type of guidance a leader might provide differed among groups. Whereas both school principals and informal teacher leaders reported that leaders guide others by modeling perceived or mandated behaviors so as to lead and coach by example, the teachers who do not act as informal leaders agreed that leaders guide through management.

Like Steve and James – the school principals – who described leadership as "guiding through trust," some informal teacher leaders articulated leadership as mentoring colleagues,

modeling appropriate behavior acting in an ethical manner, and encouraging peers. To them, leadership means:

- Bringing something to the table that other people can use and take as an example. (Joan)

- Stepping up and taking a role as someone who can provide new ideas, new concepts, and guidance. (Ella)

- Modeling the behavior that you want to see others demonstrate. (George)

- Guiding by taking the initiative to know right from wrong. (Anna)

- Encouraging others to do their best as well as themselves…taking upon responsibilities regardless of what everyone thinks around them and do what they think is right. (Gabrielle)

- Doing things in a way so that people can learn from what you are doing – practicing what you preach. (Joe)

The school principals and informal teacher leaders explained "leadership" in terms of two theories: transformational leadership (Bass, 1995) or moral leadership (Fullan, 1994; Lieberman & Friedrich, 2007). According to Bass, transformational leaders earn followers' trust by: (a) communicating their visions; (b) coaching or mentoring peers; (c) modeling desired behaviors; and (d) helping peers rethink their practice. Lieberman and Friedrich regard moral leaders as those who feel compelled to engage only in behavior they consider "right." Like Bass, and Lieberman and Friedrich, the principals and informal teacher leaders perceive a leader as one who feels a moral obligation to do what is right and who models the appropriate behavior in order to coach others to do the same. These informal teacher leaders' descriptions of leadership, in general, also are consistent with Lieberman et al's (1998) categorizations of teacher leadership, which include guiding by building rapport and trust in others.

Whereas the principals and informal teacher leaders regard leadership as "moral" (Lieberman & Friedrich, 2007) and "transformational" (Bass, 1995), the teachers who do not lead informally perceive leadership as the responsibility of a manager who might wield force or authority. They explained that a leader:

- Tells others what they want them to do, and the followers do it. (Mark)

- Is someone who other teachers come to for advice because they [leaders] have the ability to see a problem clearly and come up with a solution that is recognized by followers. (Dex)

- Really holds a position of responsibility and power…manages things well, gets things done. (Bill)

- Takes charge. (Christina)

Unlike their colleagues who lead, these teachers do not identify leadership as a moral obligation to model behavior. To them, a leader guides by exercising power. However, when asked to identify behaviors of informal teacher leaders, the non-leaders never reported witnessing informal leaders using power to accomplish their goals. Instead, all respondents commented only upon informal teacher leaders' willingness to engage in extra-role behaviors (Organ, 1990) beyond which are expected of them. Thus, non-leaders may not perceive informal teacher leaders as "leaders" because they neither guide through management nor attempt to force colleagues' actions.

Whether or not they regard their colleagues who choose to lead informally as "leaders," non-leaders' recognition that the informal leaders in their schools do not exercise authority is consistent with the literature reviewed. According to Frost and Durrant (2003), informal teacher leaders do not wield power, but lead by examples which often include the voluntary assumption

194

of extra responsibilities and the empowering of colleagues. The next section of this chapter details this kind of leadership.

5.2 RESPONDENTS' DESCRIPTIONS OF INFORMAL TEACHER LEADERSHIP

Before I interviewed participants, I explained to them the difference between formal and informal teacher leadership so that they were able to respond to the questions designed to help them describe the phenomenon under study. To clarify the term "informal teacher leadership," I used the operational definitions of formal and informal teacher leadership presented in Chapter 1. While defining the terminology, I was careful not to give examples of leadership behaviors so that I did not influence respondents' descriptions of informal teacher leadership. All respondents distinguished informal teacher leadership as going beyond the bare minimum teaching requirements; however, respondents' notions of the bare minimum teaching requirements varied (Respondents' descriptions of the bare minimum teaching requirements are detailed below in Section 5.4). Lydia, an informal teacher leader, summarized the contention of all respondents:

It's [an informal teacher leader] a teacher that, um, goes above and beyond – someone that if something needs done, you're just willing to do it. You aren't looking for extra money; you're not looking for praise or recognition. Maybe a teacher the others know they can rely on to get something done; somebody that's competent in what they're doing.

Lydia's description of informal teacher leadership is consistent with the literature. A number of researchers had discovered that teacher leaders are willing to extend their efforts beyond the classroom, or which is expected of them as per the terms of their teaching contracts

(Blasé & Blasé, 2000; Danielson, 2007; Donaldson, 2007; Fullan & Hargreaves, 1996; Gehrke, 1991; Katzenmeyer & Moller, 2001; Lieberman & Miller, 2005; Wilson, 1993). For this study, respondents regarded informal teacher leaders as those "willing to do extra." However, notions of "extra" varied significantly among the groups interviewed because their ideas of the bare minimum teaching practices differed tremendously. Basically, some non-leaders' opinions of "extra" behaviors corresponded with principals' and informal teacher leaders' descriptions of behaviors that they regard as "bare minimum." This information is explained more clearly below.

5.3 BEHAVIORS OF INFORMAL TEACHER LEADERS

As part of their descriptions of "informal teacher leadership" as an extension beyond the classroom, respondents offered their ideas as to the specific extra-role behaviors (Organ, 1990) that an informal teacher leader might demonstrate. As a means of describing informal teacher leadership, respondents also detailed ways in which informal teacher leaders might interact with their colleagues.

To the respondents, a teacher's eagerness to extend himself/herself beyond the classroom is illustrated by, but not limited to: (a) arriving to work earlier and staying later than expected; (b) attending events after school like football or basketball games, dances, or recitals for the purpose of interacting with parents or supporting students outside the classroom; (c) giving students food or clothing if their basic needs are not being bet at home; (d) tutoring students during his or her preparation period; (e) sponsoring clubs and activities; (f) remaining available for students should they wish to discuss an issue that might not be related to their academics; (g)

accompanying students on field trips that are not mandated by the District; (h) displaying students' work in the hallways; (i) contacting parents before or after contracted hours; and (j) assisting colleagues so that they might improve their students' achievement. Although respondents offered many more examples of extra-role behaviors (Organ, 1990), those listed above were the most common responses gleaned from interviews. I also listed respondents' examples of informal leadership behaviors according to how frequently they were given during interviews. Hence, respondents consider "arriving to work earlier and staying later than expected" the most obvious example of informal teacher leadership.

Respondents' descriptions of behaviors that informal teacher leaders exhibit are consistent with those detailed in the literature reviewed. Like those interviewed, Oplatka (2006) reported that teacher leaders' energies might be directed at individual students, or groups of students. Additionally, Gonzales (2004) also recognized that teacher leaders encourage their colleagues to consider student achievement. Finally, Muijs and Harris (2007) argued the same point that every respondent had made at least once during his or her interview(s): Informal teacher leaders voluntarily engage in the aforementioned behaviors without expecting to be compensated for their efforts.

While the school principals and informal teacher leaders spoke from first-hand experience (I contend that school principals likely served as informal teacher leaders before assuming administrative positions simply because attending graduate level courses necessary to earn principal certification illustrates a drive to do extra), the teachers who do not lead informally either speculated about behaviors they assume informal teacher leaders might display, or reported the behaviors of informal teacher leaders that they observed. Nevertheless, all groups

197

interviewed had offered similar suggestions as to those behaviors that demonstrate informal teacher leadership. This information is presented in the next section.

5.3.1   Non-Leaders' Descriptions of Informal Leadership Behaviors

Some of the teachers who do not serve as informal leaders acknowledge their reluctance to extend themselves beyond their classrooms (Their reasons as to why they do not lead informally are discussed later). They did, however, attempt to describe the behaviors of colleagues whom they deem "informal teacher leaders," and their descriptions clearly illustrate their colleagues' willingness to lead. Additionally, non-leaders' descriptions of informal leaders' behaviors illuminate the kinds of behaviors they choose not to demonstrate. Non-leaders' explained:

- He gets a lot of grief from a lot of different places in the school, and um, no matter what happens, when it happens, he still is always at the highest standards for when and how he teaches. (Bob)

- It's just unbelievable the amount of time he puts in…does anything and everything anyone could ask of him…he does extracurricular stuff with kids, fieldtrips, morning announcements, runs a bunch of different programs, produces videos and movies. He basically runs the school. (Bill)

- She attends a lot of functions; she helps with fund raising. She's always here very early in the morning. She's here late at night. She never really complains – never really says anything about other colleagues. She kind of keeps to herself. Kind of quiet. Seems to enjoy teaching. (Christina)

- She does everything. She lives and breathes education. She plans the most exciting and interesting lessons everyday – puts hours and hours in both before and after school. She

comes to all the after-school events just to see the kids. The principals know they can go

to her to do anything they need her to do. She is willing to help everyone – even the

people who have been kind of mean to her. (Mark)

The non-leaders' examples of informal leadership behaviors support the notion that

informal teacher leaders work extra hours, sponsor or attend extracurricular activities, and assist

their colleagues and principals. Their examples also support one of my findings discussed in

Chapter 7: Some colleagues display animosity toward informal teacher leaders, purportedly for

their readiness to undertake leadership tasks. Thus, in regard to this study, another demonstrable

behavior of informal teacher leaders is their consistent attempts to foster professional

relationships even with unkind colleagues.

5.3.2   Leaders' Descriptions of Informal Leadership Behaviors

The interviewed principals and informal teacher leaders also provided descriptions of colleagues

whom they regard as informal teacher leaders. Their descriptions were consistent with those

written above; they spoke of colleagues who: (a) work long, non-contracted hours; (b) assist

peers; (c) support students academically and emotionally; and (d) organize and sponsor

extracurricular activities. However, the informal teacher leaders eagerly offered examples of

their own behaviors that they believe elucidate the phenomenon.

Chloe enthusiastically described her own informal leadership behavior which includes

ensuring that every student receives her best efforts every day. She truly believes that all

students can learn and will achieve if she works diligently on their behalf. Chloe explained:

I take the extra time to reinforce the positive; I'm constantly calling home or sending

home notes…I make myself available for kids. I differentiate my instruction so that I am

sure to reach all learners. I have kids who want to shut down and I refuse to let that happen.

Lydia, Chloe's colleague, also strives to support her students through meaningful lessons. Lydia relayed a story to clarify that sometimes, the most important lessons she teaches extend even beyond the school building:

My students and I came up with an idea for their project. We're making jewelry, and we thought that if we can sell it at open house, then we might be able to raise enough money for a fieldtrip. We did! We went to an art museum. I said to my kids, "Make and take home what you want, but if you can make extra, then we can sell it." This way, they can take their work and market it, and do something extra beyond what we did in the classroom. They found it very rewarding that they made something and saw a profit from it. It was a great experience for them.

Lydia perceived a need for her students to learn how to create, manage, and market a product, so she arranged for them to design, advertise, and sell jewelry in order to raise enough funds to visit a venue where they could learn more about the arts. By organizing this project, Lydia gave her students confidence and strengthened her relationship with them – two hallmarks of informal teacher leadership (Lieberman, Saxl, & Miles, 1988).

Like Chloe and Lydia, Ella extends herself so that she engages her students in relevant lessons and remains a constant support to them. She displays additional informal leadership behaviors by serving as an assistant to her supervisors, and a role model and confidante to her peers. Ella said:

Administration likes to use me as an example; they send people in to talk to me. I have teachers observe my classes. I email assessments to different teachers so they can use

them. I will sit down and talk to teachers who are in a rut. As far as the kids go, I take

into consideration what they are interested in and provide a lot of opportunity for them to

make decisions and have choices about their education…I give them a say in the class…I

am somebody they can talk to even if [the issue] is not school related. I go to see them

play sports; I help with the dances…I stand around in the hallways at the end of the day.

I just kind of hang around, and I'm there very early in the morning if they need to come

in and talk (Ella).

Ella discussed how she often serves as a model for her colleagues who frequently observe

her classroom to learn how to differentiate instruction and employ appropriate methods of

assessment. Her realization that modeling for peers is an example of informal leadership

behavior is consistent with Harris' (2003) and Oplatka's (2006) findings that informal teacher

leaders model for and coach colleagues. As Olson (2005) discovered, teacher leaders engage

colleagues in pedagogical discussions to promote professional development, and Ella does

exactly this whenever she redirects teachers who are struggling. Informal teacher leaders like

Ella, who acts as a mentor for her colleagues, have been able to lead effectively by gaining their

peers' trust – a tenet of effective leadership as described by school principals in Chapter 4.

Unlike the aforementioned informal teacher leaders, who mainly lead by striving to

increase student achievement during the school day, David assists students after hours. To "do

the job to the best of [his] ability," David, a science teacher, sponsors two extracurricular

activities that focus on academics and conducts after-school tutoring for sixth grade math

"because [the school principal] couldn't find anyone else to do it."

Most respondents spoke of their willingness to spend more time with students than that

specified by the terms of their contracts. However, a number of respondents acknowledged either

informal teacher leaders' or their own ability to navigate the structure of schools in order to encourage change or challenge the status quo. For example, David mentioned that he volunteered to tutor students because he recognized the organizational need for increased student achievement.

Informal teacher leaders like David are able to diagnose organizational needs and then act accordingly (Oplatka, 2006; Silva, Gimbert, & Nolan, 2000). Other interviewed informal teacher leaders exemplify this ability as well. For example, Anna realized that her physical education students would benefit from having access to exercise equipment, so she "spent hours" applying for a grant that resulted in the school's acquisition of several thousand dollars worth of equipment. According to Anna, "The grant has brought on a whole new level of responsibility." Anna's acknowledgement that her students were not recognizing the benefits of leading a healthy lifestyle resulted in an enhanced physical education curriculum and more constructive use of students' time. Her design of instruction in accordance with students' needs demonstrates Oplatka's second domain of "organizational citizenship behaviors," displayed by teachers who recognize the needs of whole classes of students.

Similarly, when he noticed that Steve was struggling to juggle responsibilities while the assistant principal was away, George (who earned a principal's certificate years prior) agreed to act as the school's disciplinarian. George's ability to recognize Steve's need for assistance and willingness to act as a formal leader for no compensation are examples of informal leadership behavior and consequently, organizational citizenship behaviors (Oplatka, 2006) found to be demonstrated by informal teacher leaders.

Joe not only diagnoses organizational needs, but also considers the needs of the surrounding community. Joe explained that informal leadership "is more than just a job":

202

It goes deeper than that. I teach a new finance class. Uh, I lobbied for it. I felt the need…With all the financial problems going on [in the community], with all the bankruptcy, with all the personal debt, just with what's happening in [the students'] own houses…I don't feel that the parents are well versed in it [finance], so if they're in trouble, our students definitely model what is happening in their homes. I feel I need to start somewhere. What I'm hoping for is that [the students] turn around and teach their parents. I also have a student teacher. I take as many as I can. I, uh, usually wait to take [a student teacher who is] in a bind [because he/she did not achieve success at a previous placement], and then I'll take [the student teacher].

Joe lobbied for a new class to help his students, and ultimately community members, learn how to manage their finances because he recognized a community-wide need for education on the subject. As an informal teacher leader, Joe builds trust and confidence in others, diagnoses organizational needs, deals with change, and manages resources – all behaviors of informal teacher leaders (Lieberman, Saxl, & Miles, 1988).

To summarize, the interviewed informal leaders are able to assess the needs of their organizations or students, and promote and manage the changes necessary to move their students, schools, and communities forward. Although respondents' descriptions of their own or observed informal leadership behaviors were similar and consistent, their notions of the bare minimum requirements of teachers proved to be quite different among groups. This information is reported below.

203

5.4   RESPONDENTS' IDEAS REGARDING WHAT BEHAVIORS CONSTITUTE

BARE MINIMUM TEACHING PRACTICES

During interviews, I asked respondents to describe the behaviors they deem "bare minimum teaching practices," or those behaviors they believe all teachers should exhibit to fulfill their obligations as educators. I reminded respondents that when commenting, they might want to offer their opinions about behaviors that constitute "bare minimum practices" regardless of the terms specified in their contracts. By prompting respondents to discuss their thoughts on this issue, I hoped to gain a better understanding of informal teacher leadership, and particularly, a more comprehensive recognition of the behaviors that most educators acknowledge as "behavior that goes beyond role requirements" (Organ, 1990, p. 45). Additionally, I intended to learn if teachers' recognition of extra-role behaviors is consistent with Oplatka's (2006) presentation of the extra-role behaviors that constitute organizational citizenship behaviors (Organ, 1990, p. 46).

While analyzing data, I used educators' responses to the prompt, "Describe the behaviors of teachers that you regard as the 'bare minimum'," as a means of triangulation. Essentially, I knew respondents' descriptions of "bare minimum teaching practices" and extra-role behaviors of teachers *should* be different. If respondents' descriptions of the two were similar, then I asked them for clarification during a follow-up interview.

What I uncovered is this: (a), The principals' notions of "bare minimum teaching practices" differed significantly according to their schools' cultures (School culture as an influence upon informal teacher leadership is addressed in Chapters 4 and 7); and (b) teachers' ideas of "bare minimum practices" varied greatly according to their willingness to lead informally. Since teachers' willingness to lead informally appears linked to their schools'

cultures, I surmise that in regard to this study, school culture shapes educators' opinions about behaviors that every teacher – informal leader or otherwise – should exhibit.

I also learned that respondents' notions of extra-role behaviors (Organ, 1990) parallel Oplatka's (2006) findings regarding teachers' "organizational citizenship behaviors." I inferred that any behaviors (of teachers) beyond those identified as "bare minimum" could be considered extra-role behaviors (Organ, 1990), and thus, organizational citizenship behaviors as displayed by teachers. This information, as well as my interpretation of the data and references to literature, is woven throughout Sections 5.4.1, 5.4.2, and 5.4.3. These sections are divided according to groups interviewed.

5.4.1   Principals' Notions of Bare Minimum Teaching Practices

The principals expect all teachers to "do their job" by upholding the terms of their teaching contracts. These terms include: (a) planning lessons; (b) grading papers; (c) completing necessary paperwork; (d) arriving to work on time and staying for the duration of the workday; and (e) making certain that students are safe. To James, principal of Middleton, the bare minimum teaching practices do not extend beyond the terms of teachers' contractual agreements with the District. However, Steve, principal of Smallville, explained that he perceives the bare minimum requirements of teachers as more than just adherence to a contract:

> I think to engage students in today's times, a teacher needs to do more than stand in front
> of them and talk…Nowadays, [teaching] requires a great deal of effort – planning on
> teachers' parts to involve all students in the class, all students at different levels…Their
> role is to instruct the students to do the best they can to grasp the skills and the concepts

and the curriculum. Their role is to provide a safe, warm, caring, nurturing learning environment for all these students, and um, make sure they all succeed.

Whereas Steve acknowledges that all teachers should differentiate their instruction in a caring, nurturing environment so that all students succeed, James regards the bare minimum practices as "teaching and nothing else." The principals' notions of bare minimum teaching practices reflect the cultures of their schools. While discussing bare minimum practices, James explained: "A lot of times, I feel like I'm 'pulling teeth' around here…A lot of times I feel like I have to be manipulative to get something done." James continued to explain that to him, teachers who nurture students fall into the category of "informal leaders" because contractually, teachers are not required to create a caring environment. During our correspondence, James mentioned these "mother hen types" a number of times: "Informal teacher leaders are the ones that connect to students…the 'mother hen people'…These are people who are caring; they're like 'pseudo-mom.' They're nurturing."

Teachers who nurture their students exceed James' expectations, which are limited to the terms of teachers' contractual agreements with the school district. Moreover, James seems to regard the female teachers as those who surpass bare minimum practices. While speaking about the "mother hen types," James clarified that all "mother hen types" in the school are women. James may perceive some of his male teachers as "nurturing," but he neither stated nor alluded to the idea during our conversations.

In short, James feels that any behavior beyond those specified as per the terms of the teachers' contract is outside "bare minimum practice." Although he wishes that all teachers would extend themselves, he deems any non-mandatory behavior an extra-role behavior (Organ, 1990). Conversely, Steve believes that although the teachers' contract does not specifically state

that teachers need to nurture students by providing them with a safe and caring learning environment suitable for taking academic risks, nurturing students is the least his teachers can do. The informal teacher leaders' attitudes about "bare minimum practices" reflect Steve's. They also agree that every classroom teacher should exercise empathy as a means of increasing students' overall achievement. This theme is developed in the next sub-section.

5.4.2   Informal Teacher Leaders' Notions of Bare Minimum Teaching Practices

The informal teacher leaders define "bare minimum practices" differently than their principals, but they maintain similar attitudes about the particular practices that fall under the category of "bare minimum." No matter the schools in which they work, most informal teacher leaders perceive the bare minimum practices much like Steve does so that at the very least, they believe that teachers need to show students that they care, and work diligently to ensure all students' success.

According to Somech and Bogler (2002), teachers who are highly committed to their schools should engage in behaviors beyond the minimal expectations. Behaviors beyond minimal expectations are known as organizational citizenship behaviors (Organ, 1990). Steve and James certainly believe that the referenced informal teacher leaders demonstrate organizational citizenship behaviors (After all, this is why Steve and James recommended them for this study). The following informal teacher leaders behave in ways that illustrate high levels of commitment to their schools. They clearly agree with Somech and Bogler's opinion that all teachers should demonstrate organizational citizenship behaviors so that displaying such behaviors *is* the bare minimum.

207

To Lydia, even a teacher doing the bare minimum "presents the material to students in a way that they, hopefully, can gain knowledge and retain the material, and creates an environment where students all students can learn." Lydia continued to describe this type of environment as nurturing and inviting – one in which students' work is displayed and where they "can feel safe and cared for." Joe acknowledged that every teacher should "prepare to teach an interesting, effective lesson…and be prepared to put on the best lesson." Joe noted that every teacher's job is to prepare students to succeed on the high-stakes, standardized tests, so his description of the bare minimum teaching practices included "teaching to the standards," and "making sure that all students are proficient or advanced on the PSSA." Likewise, Gabrielle had agreed that every teacher – informal leader or not – needs to ensure the success of his or her students. She explained, "The role of any classroom teacher is to teach their students to be successful…to help students and encourage students each and every day to perform their best."

Although other informal teacher leaders like Ella and David deem the bare minimum practices as "walking in the door on time and leaving the second school is over" and "doing the same thing year after year, like throwing worksheets at the kids," they asserted that such practices are "unacceptable." However, all informal teacher leaders interviewed felt that at least for them personally, the bare minimum teaching practices include putting forth their best efforts so that all their students can succeed in a safe and nurturing environment that is conducive to learning. Chloe summarized the contention of the group:

> The role of any classroom teacher is this: I believe that when you come here, you have to be well prepared and that you show a love for the subject that you are teaching, and that you are trying to make sure the students understand that you are here to support them.

208

Students need to know that you are willing to go above and beyond for them to help them understand.

The informal teacher leaders uphold the importance of students' acknowledgment of their leadership behaviors. These respondents want their students to know that they extend themselves, especially when they assume extra responsibilities for the sake of assisting or supporting students. However, most informal teacher leaders made a clear point while interviewing: Students' recognition of them as informal leaders does not validate them personally. Essentially, the informal teacher leaders do not "go above and beyond" for students in the hopes of earning extrinsic rewards, like verbal praise or gifts from students and parents. Instead, they want students to "know they care" because they believe their students will work harder and achieve more if they support students and remain empathetic.

Informal teacher leaders' recognition that "students will work harder for teachers they like" is consistent with Ernest Mendes' (2000) findings. According to Mendes, empathetic teachers can significantly increase their students' achievement simply by remaining compassionate. Mendes purports that "students respond to us because we care, and because they like us." To me, the informal teacher leaders understand that their students need both structure and nurture in order to respond positively and achieve their best. Thus, like Principal Steve, they consider a teacher's creation of a nurturing classroom environment an example of "bare minimum practices."

5.4.3   Non-Leaders' Notions of Bare Minimum Teaching Practices

No matter how they described the teaching practices which they deem "bare minimum," all interviewed principals and informal teacher leaders specified the importance of teachers going

beyond bare minimum practices if they wish to move their school districts forward. Conversely, the teachers who choose not to lead consider the bare minimum practices satisfactory and referenced their own work when articulating their thoughts. Non-leaders' offering of personal descriptions of "bare minimum practices" illustrates their convictions about such practices being acceptable. Non-leaders' discussions about bare minimum practices differed substantially from informal teacher leaders' because the informal teacher leaders did not frame their ideas about bare minimum practices in terms of behaviors they either do or do not exhibit. Perhaps the non-leaders conversed about their respective practices as a means of justifying their reluctance to assume extra responsibilities. As reported above, many non-leaders (and informal teacher leaders) suspected why they were recommended to engage in a study about informal teacher leadership. If they supposed their principals advised them to partake in this study because they symbolize the antithesis of "informal teacher leadership," then they may have felt a need to rationalize why they choose not to lead informally. Non-leaders described the bare minimum practices as follows.

Mark professed that he does the bare minimum, which he believes "is fine." He reported: "I fulfill the obligations of my contract. I show up right on time, do what I have to do, and leave as soon as I can. I have been doing this job for a long time, and I have learned not to do more than I absolutely have to." Bill also referenced the practices that he regards as the bare minimum by using his own performance as an example. He explained, "I make sure everyone is on task, and just monitor the activities and keep my eye on everything...just being the leader of the chaos." Likewise, Dex framed the bare minimum teaching practices by mentioning his own behavior: "It's doing what I have to do by the contract...Having enough knowledge of the contract and be able to teach in a way that is understandable." Whether she had intended to

reference her own practice or not, Christina simply noted that the bare minimum practices involve "coming in here every day and teaching."

The non-leaders' descriptions of bare minimum practices were short and lacked imagery. To address the issue, they referenced their teaching contracts and personal practice. While commenting, some of the non-leaders' word choices, like "just" and "have to," supported my suspicion that they do engage only in minimum practices. My argument is that if a teacher "just" does what he/she "has to do," then he/she chooses not to lead. Furthermore, if these teachers believe that the terms of their teaching contracts represent "bare minimum practices," and they engage specifically in mandated behaviors, then they do the bare minimum and view this as adequate.

5.5   THE PERCEIVED LINK BETWEEN INFORMAL TEACHER LEADERSHIP AND STUDENT ACHIEVEMENT

All respondents perceive a link between informal teacher leadership and student achievement. However, when prompted, no respondent was able to articulate a direct link between an informal teacher leadership behavior and a specific incident during which students' achievement increased as a result of that behavior. The principals and informal teacher leaders referenced no assessment data or literature to substantiate the claim, yet they discussed specific examples of increased student engagement as a result of their extra efforts.

The informal teacher leaders, particularly, were able to speak about how they perceive their influence upon their own students' achievement, and their students as individuals. Based upon their examples of how their extra-role behaviors (Organ, 1990) improved student

achievement, I believe they perceive "student achievement" as more than making "As" or performing proficiently on high-stakes standardized tests. To the informal teacher leaders, "student achievement" includes personal growth, the acquisition of essential skills, good citizenship, and a desire to learn. This information is described below.

Ella, an informal teacher leader, recognizes that she engages in informal leadership behaviors whenever she plans lessons that not only meet the State's standards and address her school district's curriculum, but also help students transfer the content and skills they learn inside her classroom to real-life situations. As Ella explained, "Nowhere in my contract does it mandate that I teach lessons that are relevant to students personally. I just have to follow the curriculum." Since Ella regards her planning of meaningful lessons as an informal leadership behavior she was able to comment on how she believes her teaching of "relevant" lessons improves her students' achievement. Ella said:

> During my lessons, I really try my best to help [the students] retain the information instead of just spit it back out for a test and then forget about it…I also help them build up skills instead of just, uh, memorizing for my classes. I try to focus on, um, making them achieve more in the long run so that they can become more life-long learners…And I really try to encourage my learning support students, who are quite capable and creative. I want them to, um, understand that they can achieve and improve as students. Everyone is capable of that.

Like Ella, other informal teacher leaders suspect a connection between the lessons they plan and facilitate and their students' achievement. Anna believes that teachers need to plan relevant lessons if they want their students "to learn and grow as individuals." She explained:

212

"You have to find out what the kids like and make [lessons] meaningful for them. You have to relate [lessons] to their lives as much as you can so they grasp [content] better."

Similarly, Lydia feels confidently that she increased her students' achievement as a result of a field trip she "spent a long time planning": "They learned so much and found it very rewarding….I feel I really make a difference in the community by arranging for students to go beyond in class." To prepare her art students for this field trip, Lydia instructed them to design, create, market, and sell jewelry to community members. Students exercised good citizenship behaviors, worked cooperatively, practiced organizational skills, and learned how to manage money as a result of engaging in this activity. Lydia maintained that because of this experience, students learned essential skills they will use throughout their lives; thus, their achievement increased.

Finally, Gabrielle stated that she works assiduously as a resource to help students learn. She said:

> During my lessons, I want my students to get the most out of me. I want them to see me as, uh, their teaching tool. I want them to ask how they can better themselves by using my knowledge or the things I teach them.

Gabrielle claims that her students' achievement continues to improve because she encourages them to ask questions. To Gabrielle, inquiry promotes learning.

David, also an informal teacher leader, elucidates how he perceives the link between his actions and student achievement. Like Ella and her colleagues, he realizes that "going above and beyond" for students may affect their overall achievement. However, David's informal leadership behavior sometimes literally extends beyond his classroom, for he voluntarily tutors students outside school hours. David commented:

I'm here for the kids in all capacities. If I need to go to a kid's house to tutor him, then I go to his house to tutor him – free of charge. If I have a kid who has the desire to learn something, I will lead them to their future career or endeavor…I try to guide them towards their goal.

Although as a tutor David remains interested in improving students' academic performance, he seemingly regards "achievement" as more than letter grades. David also strives to instill in students "the desire to learn" as a means of increasing their achievement.

George, also an informal teacher leader, acknowledges his influence on his students' achievement; however, he frames the situation differently than Ella and David. Whereas Ella and David will extend themselves beyond the terms of their contractual agreements for the sake of their students' achievement by either planning lessons deliberately or tutoring students outside of school, George feels that he affects his students most obviously via the behaviors he models. As George recognized:

You have to model good behavior. Some of our kids may not come from good backgrounds. They probably see things that are pretty crazy…I think that students can take on the personality of their instructor. Since I want them to achieve, I try to model how they can do that. I value education; I am constantly reading and writing. I expect them to read and write, and I tell them stories of how I am constantly doing the same thing…I also explain to my kids why I am behaving this way – why I am doing these things and asking them to do them. This shows them that you care. It really opens up the lines of communication a lot.

Anna, an informal teacher leader who also works diligently to plan meaningful lessons and provide her students with opportunities to connect with her personally, substantiated

214

George's claims as she spoke of a colleagues' modeling of "appropriate behavior." Anna offered:

> [Joe's behavior] is miraculous! If the kids need help, or if they're not feeling well, they ask, "Can I go down to [Joe's] room? I need some extra help on this." I mean, they want to go! They know when he's off and they wanna go down there for help. And I never ever see kids fooling around in there. It's not like they go down there and party. They, um, genuinely want to learn from him because they see him wanting to learn. And I just look at him and think he's amazing.

Most interviewed informal teacher leaders described their own actions while attempting to explain the perceived link between informal leadership behaviors and student achievement, which to them involves students' happiness and desire to learn. Steve and James, the school principals who lead formally in lieu of informally, were unable to give personal examples of how informal teacher leadership might affect student achievement. Instead, they detailed teachers' informal leadership behaviors to explain how informal teacher leadership and student achievement might be interrelated. However, when asked if they recognize a connection between their own behaviors as educators and student achievement, both school principals upheld that their formal leadership behaviors affect student achievement tremendously because as James asserted, "Everything we do is for students in the hopes of increasing their achievement."

The non-leaders, on the contrary, were not always able to imagine such a link between their behaviors as educators and their students' achievement. While some of them remain unsure as to how their behaviors might affect students' growth, others admitted that they may fail to increase some students' achievement. Mark explained: "I don't know if my students achieve or

215

not. I would like to think they do. But, I can't control what they learn. I can do my best to help them, but [achievement] is ultimately up to them."

Like Mark, some other non-leaders feel that student achievement is beyond their control. Christina claims that her goal is to graduate her learning support students from the program and help them assimilate "back into the regular classroom," but the task is overwhelming and "sometimes doesn't happen." Similarly, Bill – a physical education teacher - recognizes that influencing student achievement is complicated because "it's really hard to motivate someone to be active." Mark, Christina, and Bill seem to feel that improved student achievement simply may not occur in all instances because their task of increasing students' achievement is daunting.

Whereas the aforementioned non-leaders think increasing students' achievement is difficult, others regard the expectation that teachers can increase all students' achievement as unrealistic. Bob professes that sometimes, student achievement just does not occur. Bob argued: "The world is a competitive place. Some [students] are gonna do well and others just aren't." And according to Dex, "Not every student is going to achieve. That's the reality of it."

Even though the non-leaders uphold that not every student is going to achieve and were unable to speak assuredly about whether their instruction helps students to progress,   they desire for their students' achievement to improve. Moreover, they surmise that informal teacher leadership positively influences student achievement. I therefore infer that although non-leaders accept the idea that all their students may not achieve, they distinguish between their work as educators and that of informal teacher leaders.

In retrospect, both the interviewed school principals and informal teacher leaders perceive a connection between leadership behaviors – namely, their own – and increased student

achievement. Nevertheless, they were unable to offer specific examples of which informal leadership behaviors paired with particular incidences of improved student achievement.

Their inability to present data to elucidate how informal leadership behaviors increase student achievement may result from two issues: Either the informal teacher leaders never gathered and interpreted assessment data to substantiate the notion that their efforts positively affect students' achievement, or they sometimes perceive "student achievement" as intangible and immeasurable. If the informal teacher leaders view "student achievement" as more holistic than a student's academic performance, then to them, students achieve when they inquire, demonstrate zeal to learn, and appear content. Since these aspects of student achievement might be more difficult for informal teacher leaders to measure, they can only deduce how their behaviors might shape their students' achievement.

5.6   A SUMMARY OF "INFORMAL TEACHER LEADERSHIP" IN DIFFERENT CONTEXTS

In the school environments researched, "informal teacher leadership" manifests as "going above and beyond" the terms of teachers' contracts. What this actually looks like in reality differs according to the schools' cultures and specific needs of students, thus making informal teacher leadership situational. To the school principals and informal teacher leaders, exercising informal leadership is the only way for teachers to show their students that they care and positively influence their achievement – in their opinion, the very least that teachers can do. Thus, most

respondents purport that teachers' assumptions of informal leadership responsibilities is both critical and expected even though teachers' contracts do not call for them to extend themselves beyond simply disseminating information to their students.

Although they were unable to offer definitive proof of this phenomenon, all school leaders feel confidently that their extra efforts strengthen their organizations' goals – namely, to improve student achievement. Collectively, these extra-role behaviors (Organ, 1990) can be termed organizational citizenship behaviors (Oplatka, 2007; Organ, 1990). The leaders believe that at the very least, all teachers should demonstrate organizational citizenship behaviors and consider these behaviors "bare minimum teaching practices." In practice, organizational citizenship behaviors include: (a) helping colleagues; (b) displaying good sportsmanship; (c) considering the organization's needs as a whole; and (d) taking individual initiative to develop professionally (Oplatka, 2006; Podsakoff et al., 2000). The informal teacher leaders who mentor their colleagues, maintain a positive attitude, diagnose organizational needs, and reflect upon their practice voluntarily exhibit organizational citizenship behaviors that positively influence their schools.

Conversely, those interviewed who have chosen not to lead informally remain content to assume only those responsibilities outlined in their teaching contracts. Additionally, they remain uncertain as to whether their work as educators improves their students' achievement and in some cases, accept that it may not.

Regardless of how informal teacher leadership manifests in diverse contexts, perceptions matter. Informal teacher leaders' perceptions of themselves, as well as their discernment of their colleagues' perceptions of them as leaders, significantly influences their behavior. This aspect of informal leadership is explored in Chapter 6.

6.0   REPORT OF FINDINGS: RESPONDENTS' PERCEPTIONS OF INFORMAL TEACHER LEADERS AND THEIR ROLES

The informal teacher leaders' perceptions of themselves and their roles appear to drive their leadership behaviors. Additionally, informal teacher leaders' acknowledgements of their colleagues' perceptions of them – whether actual or perceived – also seem to influence their leadership behaviors. This chapter explores the influence of perceptions on informal teacher leadership, and addresses the question, "How do respondents perceive informal teacher leaders and their roles?" The chapter is divided according to the following analytical codes, or themes, that surfaced during data analysis: (a) informal teacher leaders' perceptions of themselves and their roles; (b) informal teacher leaders' recognition of their principals' and colleagues' perceptions of them, and their relationships with their principals, fellow leaders, and colleagues who do not lead; and (c) school principals' and non-leaders' perceptions of informal teacher leaders and their roles, or the leadership behaviors they demonstrate. The next section addresses how informal teacher leaders' perceptions of self influence their leadership behaviors.

6.1   INFORMAL TEACHER LEADERS' PERCEPTIONS OF THEMSELVES AND THEIR ROLES

All interviewed informal teacher leaders perceive themselves as leaders of both students and colleagues. Together, they uphold the importance of serving as role models to their peers, assistants to their supervisors, and most importantly to them, outstanding educators of their students. They are positive, reflective, and maintain a strong sense of purpose. When asked the question, "How do you perceive yourself and your role?" all informal teacher leaders responded confidently and deliberately by giving numerous examples of how they extend themselves beyond their classrooms to influence others without exercising power (Every informal teacher leader interviewed asserted the importance of leading by example and by gaining colleagues' trust in lieu of attempting to force colleagues' behaviors). Furthermore, all understand that they are "here to do a job" (Lydia), and that they "need to maintain a positive attitude no matter what" (Lydia). At the same time, many remain highly critical of their respective performances because, as Lydia stated simply, "As professionals, we can always become better at what we do."

Lydia's comment about the need for teachers to develop professionally did not refer to the entire teaching staff at Smallville. Her statement was general; she simply alluded to the idea that life-long learning is essential especially for those who work in a profession that changes continually. Even more so than their schools' cultural conditions or colleagues' performances, the informal teacher leaders are critical of themselves as educators. At the end of the workday, they reflect upon their performances and interactions with students and staff, and in their own minds ask, "How can I do better tomorrow?" (Ella)

As explained in Chapter 5, some informal teacher leaders even recognize a moral obligation to help followers become good citizens of their schools and communities. For

example, Gabrielle believes that her role as an informal teacher leader is to guide her students and colleagues to become "better people." In regard to her influence upon students specifically, she explained:

> My job is to show my students that I'm a leader that they follow by example. My kids are at the age that they can be molded into doing particular things and if they see me doing things that are not expected of me but I still continue to do, then I believe that is the best way to lead by example. If I can do it without someone standing over my shoulder telling me what to do, then they should be able to do the same.

Gabrielle believes that students can achieve their best if they learn by watching a teacher put forth effort to achieve his or her best. Her contention that students "can be molded" shows that she sees her role as more than a disseminator of information, but also perceives herself as responsible for shaping students' work ethic.

Additionally, Gabrielle assumes a more caring role to meet her students' needs. She does not brandish power as an authority figure by looming over students and forcing their behavior. Conversely, Gabrielle "bring[s] a sense of culture and identity out in [her] kids" by nurturing and guiding them to realize that they may count on her as a stable adult in their lives. She explained why she approaches educating her students in this manner:

> Some of them don't have that at home. The role I choose is almost like that of a mother because a lot of my students don't have a mother at home to guide them, to comfort them, to encourage them, and to help them…The kids know where I am, day in and day out. I try to give my kids stability so they know they have someone they can turn to in times of need.

221

Evident in Gabrielle's quotation is information about Smallville's culture. As explained in Chapter 4, respondents who work at Smallville regard their students as needy. Throughout interviews, they frequently commented about their students' extensive physical and emotional needs they believe are not being met at home. As Steve contends, students who attend Smallville may not always rank high academically, but they will always leave at the end of the school day "having had a decent meal and feeling cared for." Gabrielle and her fellow informal teacher leaders share Steve's priorities in regard to students' needs: Students' physical and emotional needs must be met first so that learning may occur. Gabrielle believes that if she can show her students that she is "there for them" as a stable adult, then she will help them to feel secure. Moreover, Gabrielle believes that students who feel secure will be more receptive to learning.

Concerning their school organizations, all informal teacher leaders deem their students important; thus, these educators work diligently to ensure their students' success and happiness. Whether attempting to do their best for students by nurturing or guiding them via examples of appropriate behavior all commented upon how they perceive their roles as outstanding educators of students.

However, many informal teacher leaders also acknowledge their capacity to influence colleagues and help them develop professionally. As Joe offered, "One of the things I try to do with new teachers is if they're receptive, I try to take them under my wing, show them the ropes, and engage them in professional conversation." Joe feels compelled to assist his colleagues. During our conversations, he mentioned that he typically agrees to mentor struggling student teachers to give them an opportunity to have a more successful experience under his tutelage. Joe explained that he literally informs colleges and universities of his willingness to work with student teachers who have been dismissed from their previous assignments. Not only does Joe

feel a commitment to helping pre-service teachers develop their skills, but he also seems to enjoy the challenge that accompanies working with inexpert teachers.

As with their interactions with students, no informal teacher leaders who engaged in this research feel comfortable exercising power while aiding colleagues with their professional development. None perceive their role as to behave as an authority figure that controls either students or colleagues. Like Gabrielle, who models desired behavior for her students in lieu of trying to force them to perform as she wishes, other informal teacher leaders realize that they cannot bully colleagues to behave in a particular manner. The informal teacher leaders' perceptions of their roles as advisors, guides, or nurturers who do not wield power are consistent with the literature reviewed. Like teacher leaders studied previously (Donaldson, 2007; Lieberman & Miller, 2005; Martin, 2007; Patterson & Patterson, 2004; Peckover, Peterson, Christiansen, & Covert, 2006; Sledge & Morehead, 2006, Wilson, 1993), the respondents strive to influence their colleagues by attempting to establish collegial relationships with and among them. However, securing such relationships can sometimes prove complicated.

To illustrate this aspect of the phenomenon, Joe spoke of a time when he assumed the intermediary role of acting assistant principal before earning his principal certification and being hired officially as a school leader. Joe described how uncomfortable he felt whenever he was asked to confront colleagues who failed to adhere to the terms of their contractual agreement. He explained:

> As an informal leader, I had to be careful how I was treading because I wasn't an administrator. You know, you're just another person in the bargaining unit, you know, so you can't impose. That was one of my problems when I was "disciplinarian" for a year was that I couldn't impose my will. You know, "Here's the code of conduct. You're not

223

following it," but that wasn't my job. I wasn't good at that part of the job. I was saying, "This is what [the teaching contract] says. You have to do this!" And they looked at me like, "Well, who are you?! You can't tell me what to do!"

Joe realized that as an informal leader, he reserved no right to order colleagues to behave in a particular manner. Surely, principals' demands hold more clout, but even Steve and James prefer to inspire appropriate behavior instead of enforce it. Joe might have been acting as a formal supervisor but his colleagues failed to perceive him as such. Furthermore, Joe felt uneasy exercising authority he did not have while assuming an intermediary role between teacher and administrator.

Joe's words proved to be consistent with the literature regarding informal teacher leaders' attempt to influence colleagues without forcing their actions, but by modeling desired behavior and encouraging collegiality (Frost & Durant, 2003; Gonzales, 2004). In regard to wielding power as an authority figure, Joe added:

You can't force anyone to do anything. The only thing you can do as a leader is that you constantly do what you think is best. You know, moving ahead, staying ahead. I am constantly preaching to my students about learning. Learning's a life-long process. It's the same for teachers. You know, regardless of Act 48, we have to take advantage of everything that's out there, be it new content, new technology, whatever…You can't force [colleagues] to do what is right. You can model, and you can suggest, but you can't force them to do anything.

In addition to guiding their students and colleagues, many informal teacher leaders perceive themselves as assistants to their supervisors, and namely, their schools' principals. To exemplify this aspect of informal teacher leadership, Joan detailed a time when she acted as the

224

principal's advocate by recognizing a colleague's mistake, and encouraging him to consult the principal for assistance. Joan clarified:

> When I realized that [the colleague] wasn't taking enough chaperones to cover all the kids on the fieldtrip, I said to him, "You know, you really need to tell James how many people you're taking because he's going to need to know that there are going to be 12 teachers out of the building to begin with, and probably more now to cover the kids." He looked at me and asked, "Um, why are you so worried? Who cares?" I said, "Because I take my relationship with James very seriously…If I don't have integrity in his eyes, then I won't be able to do what I need to do or get what I need to get for my kids. Besides, he is the principal. He needs to know what is going on in his building. It's only right."

Joan not only advocates for her supervisor but also believes that her duty as an informal leader is to help him solve problems whenever they surface. Loyalty to a supervisor or an organization as a whole is a specific example of an organizational citizenship behavior (Organ, 1990; Podsakoff et al., 2000) that illustrates a high level of commitment. In my experience, many teachers remain loyal to their students or peers, but not many have demonstrated a loyalty to their administrators as Joan has. The culture of Middleton is balkanized (Hargreaves, 1994) so that an "us versus them mentality" (Dex) exists between teachers and administrators. Regardless of the culture and her peers' perceptions of her actions (discussed below), Joan assists James by serving as an intermediary between teachers and him.

Joan also encourages her colleagues to afford James the same kind of professional courtesy she does. She noted a time when she urged a colleague to consider possible solutions to a problem and present those solutions to the principal. While describing this exchange, Joan

explained that she never approaches her supervisor "just to complain about something," but instead, presents an issue along with possible ways to address it. Joan said:

I try to keep stuff out of the office for my principal…I told [my colleague] how I handle situations to guide him to do the same. I said, "If you have a problem and you propose a solution, James will probably let you execute it. I never expect the principal to come up with a solution to my problem. If there is a problem – and especially if it is my problem – then I will help him solve it.

All informal teacher leaders eagerly extend themselves beyond their contractual agreements for the sake of their students' achievement and colleagues' professional development. Moreover, some serve as assistants to or advocates for their administrators. Finally, some even regard themselves as integral parts of the community as a whole. Essentially, they believe that their roles not only extend past the bare minimum teaching practices within their organizations, but also beyond the school buildings in which they work.

For example, Joe asserted: "I trust and encourage my students to turn around and teach their parents the information I am disseminating. I always make extra copies of information for students' parents so they can benefit from my instruction too." Similarly, George hopes that his efforts at work ultimately better the surrounding community. He stated:

I am producing a product. That product is the students. The school board expects me to do my best. The community expects me. Um, the students are going to go out into the community. I have to give the community the best product I can.

As illustrated, the interviewed informal teacher leaders acknowledge themselves as vital in regard to improving students' achievement, assisting colleagues, advocating for supervisors, or positively influencing their surrounding communities. They perceive themselves as confident,

self-motivated, and reflective. As substantiated by the literature, the informal teacher leaders recognize that their roles are to: (a) maintain a strong sense of purpose (Donaldson, 2007; Dozier, 2007, Lambert, 2003); (b) lead without force (Donaldson, 2007; Gonzales, 2004; Pechman & King, 1993); (c) strive to build collegial relationships (Donaldson, 2007; Lieberman & Miller, 2005; Martin, 2007); or (d) extend themselves beyond their classrooms (Blasé & Blasé, 2000; Wilson, 1993). Like Joan, some also are willing to redefine their roles and responsibilities as determined by situations that arise (Pechman & King, 1993).

Although self-motivated, the informal teacher leaders also are influenced by their colleagues' and supervisors' perceptions of them – whether actual or believed. Informal teacher leaders' acknowledgement of their colleagues' and supervisors' perceptions of them often provide extrinsic motivation that significantly influences their sense of self-efficacy and resulting behaviors. This facet of informal teacher leadership is addressed in the next section.

6.2   INFORMAL TEACHER LEADERS' RECOGNITION OF THEIR PRINCIPALS' AND COLLEAGUES' PERCEPTIONS OF THEM, AND THEIR PERCEIVED RELATIONSHIPS WITH PRINCIPALS AND COLLEAGUES

During interviews, informal teacher leaders spoke freely about their principals' and colleagues' perceptions of them. First, it must be noted that although I coded data regarding "perceptions" and "relationships" as separate themes, I combine the data and analysis in this section because, according to my research, perceptions and relationships strongly influence one another. Next, I note that unless informed personally (by their principals and colleagues), informal teacher leaders' reports of their principals' and colleagues' perceptions of them are pure speculation. In

227

most instances, informal teacher leaders cannot know, for certain, exactly how their principals and colleagues view them. However, in some cases, the informal teacher leaders were able to describe particular behaviors of principals or colleagues that lead them to infer how they are perceived. Regardless, most of the analysis reported below is based upon speculation.

I chose to report this information because informal teacher leaders' suspicions about their supervisors and colleagues' supposed perceptions of them appear to influence their attitudes toward leadership. Moreover, I contend that any administrator who wishes to promote and sustain informal teacher leadership in his or her school needs to examine staff members' perceptions and relationships extremely carefully. Although the interviewed informal teacher leaders continue to demonstrate organizational citizenship behaviors (Organ, 1990) despite their colleagues' supposed pessimistic attitudes toward them, potential informal leaders might be hesitant to assume extra responsibilities if they believe their peers might react disapprovingly.

To keep the report simple, I refer to informal teacher leaders' speculations about principals' and colleagues' perceptions of them simply as "principals' and colleagues' perceptions". Additionally, the analysis is divided according to the groups studied: (a) Informal teacher leaders' reports of their peers' perceptions of them is detailed in Section 6.2.1; (b) informal teacher leaders' acknowledgement of their principals' perceptions of them is addressed in Section 6.2.2; and (c) informal teacher leaders' suspicions about non-leaders' perceptions of them is noted in Section 6.2.3. Throughout the following three sections, I substantiate the informal teacher leaders' speculations by discussing my own relationships with principals and colleagues.

6.2.1 Informal Teacher Leaders' Reports of Their Peers' Perceptions of Them, and Their Relationships with Peers

All informal teacher leaders believe fellow informal teacher leaders respectfully regard them as equals. When asked, "How do you believe fellow informal teacher leaders perceive you?" the informal teacher leaders responded with their ideas, and offered examples of behaviors to substantiate their claims. Essentially, all informal teacher leaders answered this question by describing their relationships with peers (This is why, for the purpose of analysis, I have decided to combine "perceptions" and "relationships"). They mentioned:

- Other teacher leaders and I are on the same page…They respect what you do…They understand the extra time it takes. They encourage you; they send emails to make sure things are going ok…There is no tension there at all. (Anna)

- We're all in this together, so we validate each other. We are really close. They perceive me as one of them. We commiserate…there is a joy in that for all of us. (Lydia)

- The teachers who are leaders don't walk up to each other and say, "Hey, you're doing a great job leading!" It's kind of an informal thing, but we all know who the other is. It's kind of nice to be recognized. (Joe)

- We are more than willing to bounce ideas off each other…We all have a good time. We all take our job seriously, but it's enough fun where we can try things with each other, steal ideas from each other…We help each other and interact…You know, you wouldn't share ideas with somebody if you didn't feel comfortable, or if you didn't feel they were on the same level with you. (Gabrielle)

- We are a very close-knit group. Everyone talks to each other like they are brother and sister, as opposed to rivals. (David)

- We are very open to share ideas. Collaboration is the norm. We are comfortable with each other. (Ella)

- Just today, I walked next door to talk to a guy who is also a leader. We have completely different styles, but we started at the same time and we bounce ideas off one another. So, I said, "You know, what am I supposed to do about this?" And we bounced a couple of ideas around. (Joan)

As illustrated by the responses above, all interviewed informal teacher leaders believe their peers perceive them as they perceive their peers – as equals who share responsibilities to move their school districts forward by acting as stewards of change (Phelps, 2008). This reciprocity among informal teacher leaders is evident because they feel comfortable collaborating with each other even if their approaches to education are different. Talk occurs freely and effortlessly among them so they bond as teammates. They share, assist each other, and genuinely seem to care for one another as individuals. This reciprocal, reverential relationship brings them a sense of comfort.

While the above leaders' relationships with peers are mutual and equal, some relationships among informal teacher leaders manifest as "mentor-mentee" (Harris, 2003). Although both parties maintain a high level of respect for one another, the relationship is uneven in regard to the amount of tangible "give and take" between them. Of the interviewed informal teacher leaders, Joan often engages in such relationships with younger colleagues who reveal a capacity or desire to lead:

First of all, I'm one of the older ones, so I think a lot of them come to me. They'll run ideas past me before they take them to "admin." to implement just in case there are contractual problems, or you know, they're not sure about it…They recognize me as being an honest person. They may not always get the answer they want, but they're gonna get the truth.

Joan's recognition that her mentoring of colleagues is an informal leadership behavior is consistent with Harris' (2003) explication that teacher leaders mentor or coach colleagues to improve teaching and learning. Although in one sense Joan's relationship with younger colleagues may appear unequal because she seems to be giving more than they (After all, they consume Joan's valuable time by frequently seeking her advice), Joan does find her interactions with them to be fulfilling. In this respect, Joan receives a benefit – albeit an intangible one – from engaging in these relationships as well.

As the informal teacher leaders discussed their relationships with peers, they continued to comment on how "comfortable" they feel interacting with fellow leaders (Every informal teacher leader used the word "comfortable" when describing their relationships with other leaders). While listening to them, I recall thinking: "I completely understand why they consistently use the word "comfortable." In my experience, collaborating with peers is comfortable and easy because we recognize and understand each other's innate drive to take on more responsibility than which is mandated. Thus, we never feel the need to justify our willingness to do extra; we never feel like we have to defend our leadership behaviors as we might while interacting professionally with non-leaders. Instead, there exists among us a general awareness that we want to do more than we have to.

A similar understanding of a leader's inherent enthusiasm to assume extra responsibilities exists between informal teacher leaders and their principals. The next section of this chapter discusses how informal teacher leaders believe their principals perceive them or their work.

6.2.2   Informal Teacher Leaders' Acknowledgement of Their Principals' Perceptions of Them, and Their Relationships with Principals

Informal teacher leaders understand that their principals, or supervisors, do not regard them as equals; however, they believe that their bosses do recognize them as key faculty members. When asked to reflect upon how they believe their principals perceive them, all interviewed informal teacher leaders responded by acknowledging that their bosses highly respect them and their work (The informal teacher leaders studied appear to perceive themselves and their work as interrelated).   In order to substantiate their claims, many described specific incidences of interactions between them and their supervisors. For example, Ella offered:

> I think my principal really likes me because of what I do for kids. You know, he's right
> there behind me, backing me up. He seems very interested in what I bring to the table.
> [Tthe administrators] were very proactive in defending me whenever I had a problem
> with [a colleague]. They seem to like the things I try in the classroom because the
> direction that the administration wants to go is the direction that I go in the classroom
> with some of the professional development initiatives we are encouraged to use. There is
> definitely a respect and a connection…a feeling of support from the administration.

Ella feels that her principal's protection of her during an argument that ensued with a colleague is indicative of his deference for her work and consequently, her as an individual. She also believes the administrators welcome her professional agenda, which mirrors their vision. To

232

Ella, an administrator's approval of her approach to education extends to an appreciation of her as a person.

Whereas Ella spoke with humility and speculated about the school principal's perception of her, Joan commented with utmost confidence when she alleged, "[The administrators] perceive me as someone who is gonna level with them. Sometimes, I will say to them, 'Do you want the answer? Let me know because you may not get the answer you want to hear'." Throughout the interviews, Joan described various incidences when James asked for her guidance and she advised him accordingly. Joan mentioned:

> You have to be comfortable and know [the administrators] recognize you as an honest person – somebody who is going to tell it like it is…I say to [James], "If you surround yourself with people who are always gonna tell you, 'Yes,' you never know when people are lying." I tell him this all the time, so he comes to me.

Joan's willingness to give James her honest opinion even when she knows he may want to hear a different answer to his question illustrates how relaxed she feels while engaging with him. Her behavior also shows her willingness to help, loyalty to her school, and individual initiative – all organizational citizenship behaviors (Podsakoff et al., 2000). Additionally, James' seeking of Joan's advice, in particular, shows that he does respect her as a professional and appreciates her straightforwardness.

Like Joan, George, Anna, and Gabrielle also presented explicit examples of why they believe their school principals perceive them as capable, responsible, and worthy of their respect:

- Steve knew what was going on in my classroom…so he gave me academic freedom. [The administrators] were willing to listen to me…They would back me no matter what happened. (George)

- I definitely think, um, the…principal knows if [he] gives me a job to do, then it's gonna get done. I'm just doing my job, but I think they know I care about kids. (Anna)
- Steve knows he's welcome in my classroom and I know I'm welcome in his office…There's not that tense situation, per se, between a boss and a co-worker. (Gabrielle)

When Gabrielle referenced "that tense situation between a boss and co-worker," she alluded to the idea that typically, principals and teachers fail to relate collegially. Perhaps she witnesses more adversarial or stressful relationships between Steve and some of her colleagues. Nevertheless, she and her fellow leaders believe that Steve values their leadership because he permits them to plan and facilitate lessons without guidance, asks for their assistance, or visits their classrooms.

I share the interviewed informal teacher leaders' belief that their principals respect them and appreciate their leadership behaviors. I believe that my administrators respect, appreciate, and trust me not only because they have verbalized their feelings, but also because I am able to infer their perceptions of me by considering the nature of our interactions. My administrators frequently ask my opinions regarding professional development initiatives. They visit my classroom daily, ask for my assistance, and know that I welcome and value their feedback regarding my practice. At times, they invite my critique of their leadership behaviors and solicit my advice on administrative matters. Perhaps most demonstrative of their perceptions of me, my administrators eagerly distribute leadership responsibilities to me.

In sum, informal teacher leaders believe that both fellow informal leaders and principals respect them and their work. They described this respect by detailing specific incidences that illustrate the types of collegial relationships they maintain with other leaders. Informal teacher

leaders' relationships with teachers who choose not to lead, however, do not always appear grounded in respect. Furthermore, in some instances, relationships between informal leaders and non-leaders seem adversarial. The interviewed informal teacher leaders elucidated this aspect of the phenomenon under study by speaking about non-leaders' supposed perceptions of them. This information is written in the following section.

6.2.3 Informal Teacher Leaders' Suspicions about Non-Leaders' Perceptions of Them, and Their Relationships with Non-Leaders

Most informal teacher leaders reacted physically before answering the question, "How do your colleagues who do not lead perceive you?" Many froze for several seconds; some sighed or rolled their eyes; and others smirked or laughed aloud. The informal teacher leaders' body language alerted me to the possibility that by asking this question, I might uncover an interesting aspect of the phenomenon in Smallville and Middleton. I was right.

More importantly, the informal teacher leaders were correct. When I triangulated data by analyzing non-leaders' general comments about informal teacher leaders, I discovered that informal teacher leaders' notions of non-leaders' perceptions of them were accurate. Non-leaders do not hold informal teacher leaders in high esteem (yet the feeling is mutual). For the purposes of analysis in this section of Chapter 6, however, I report only informal teacher leaders' *discernment* of non-leaders' collective perceptions of them or their work in the sampled school environments.

Additionally, as an outcome of this analysis, informal teacher leaders' perceptions of non-leaders became apparent. I must note that no interviewed informal teacher leader acknowledged that his or her low opinion of non-leaders also might influence their relationships

with non-leaders. However, I believe that informal leaders and non-leaders' perceptions of each other weigh equally in regard to influence on relationships. This information is plaited throughout this section as well.

Of the interviewed informal teacher leaders, only David perceives the relationships between all leaders and non-leaders in Middleton as collegial and "family-like." Joan and Gabrielle at least realize that adversarial relationships between leaders and non-leaders exist within their respective school buildings, but they strive to maintain friendly relationships with colleagues who choose not to lead. Specifically, Joan works to "get along with everyone in the building regardless of their commitment to education." Joan, whose comment indicates that some teachers' low level of commitment to education may be a source of others' animosity, regards non-leaders as less dedicated to the profession, yet she remains cordial to them.

Similarly, Gabrielle recognizes the difference between teachers who lead and those who choose not to lead, and that addressing such differences could result in tense relationships among colleagues. Like Joan, she tries to avoid the issue and "treat everyone the same, regardless of how they perform on the job." Additionally, Gabrielle noted, "It's hard to influence people to do things that they're not willing to do, so I try to stay out of [their way] as much as possible…If you try to isolate people, it makes [the relationship] more tense." Gabrielle's contention that teachers cannot be forced to behave in a particular way aligns with Joe and George's thoughts about the ineffectiveness of wielding power to force leadership behaviors. She and Joan believe that treating non-leaders differently than fellow informal leaders is a manipulative and forceful way to attempt to inspire them to assume extra responsibilities.

Aside from David, Joan, and Gabrielle, every other informal teacher leader adamantly believes that his or her relationships with many non-leaders either are strained or impersonal as a

result of those non-leaders' perceptions of them. Joe went as far as to qualify his relationship with non-leaders as "one of contempt." While providing examples of such disdainful relationships, informal teacher leaders simultaneously described their own perceptions of some colleagues who choose not to lead. As Ella explained:

> [The non-leaders have] been doing the same thing for years and they think it works and that there is no real way or reason to change it. So, they're intimidated by the things I'm trying to do in the classroom – the different, um, you know, whether it's the way I teach a lesson or the way I assess students. There is a lot of reluctance on their part to try anything new to see if it actually works…I get a lot of reluctance from certain people.

During our conversations, Ella continued to speak about certain non-leaders' "reluctance" to engage with her professionally because they perceive her as one who unnecessarily challenges the status quo. Eventually, she noted a non-leader's "animosity" toward her, and defended:

> When I started at this district, I was doing some things my own way, and that teacher came storming down my door with an assessment I created in her hand and screamed, "[The learning support students] cannot possibly do this!" So, I think the way that she approached me has definitely affected our professional relationship. Because of the way that this particular individual handled the situation, there is a lot of strain on the relationship.

Ella reported the above incident to illustrate her colleague's perception of her as demonstrated by this colleague's insolent behavior. Simultaneously, Ella presented her own low opinion of her colleague as a practitioner.

Like Ella, Anna also encounters negativity for "going above and beyond." When asked to describe her relationship with non-leaders, Anna said:

237

Oh, I definitely take crap for going above and beyond sometimes…I get told I'm on the "A Team." That means I'm on the "Administrative Team," like I'm one of the administrators because my philosophy parallels theirs more than the non-leaders'. They say, "Why do you want to get involved?" Or "Why do you do so much? Why do you go out of your way for that?" And my favorite: "You know you're not getting paid for that." I don't feel like there's any major major tension, but I do feel like in a joking way…sometimes people are like, "Why do you do that?" They need to let it go. Isn't that why we're here – to do a lot of work? I ask myself that a lot…It can be a little disheartening.

Anna's colleagues' questioning of her informal leadership behaviors elucidates their attitudes toward her willingness to assume non-mandatory responsibilities. However, Anna's assertion that these skeptical colleagues need to stop trying to intimidate her clarifies her opinion of them as bullies.

Lydia also maintains a level of disrespect for her colleagues who choose not to lead, but instead of attempting to avoid arguments with them, she avoids the non-leaders all together. Lydia terms a group of non-leaders the "Sour Patch Kids" because she contends that they exude negativity and are, essentially, "sour." When asked how she believes the "Sour Patch Kids" perceive her, Lydia emphatically stated, "I don't care. I am there to do my job." Lydia described her relationship with the "Sour Patch Kids" as follows:

I really don't have to see those people unless I seek them out. Sometimes, they'll come out with us socially and I try not to sit by them…Part of it is that they isolate themselves anyhow. Part of it is they are so negative. If I don't keep up my positive attitude, it would be hard to get out of bed in the morning, and I don't want that. This group doesn't

eat lunch with us. They either stay in their room, or I don't know what they do…They

make condescending remarks about, uh, um, anything anyone ever does. They say things

like, "Oh, she's doing *that* again," or "She's won *another* award." It's like, you don't

need that to bring you down. You should be positive about an award or accolade, so I

just try to ignore them.

If the exchanges Lydia reported are precise, then these "Sour Patch Kids" certainly patronize

informal teacher leaders who wish to do extra or develop professionally so as to be recognized

formally. Conversely, Lydia's disregard of the "Sour Patch Kids" might be construed (by them)

as equally demeaning.

To summarize, most of the informal teacher leaders who served as respondents perceive

their relationships with colleagues who choose not to lead as strained or rather tense. Most

communicated low opinions of non-leaders as professionals, and claimed that many non-leaders

uphold similar perceptions of them. Basically, informal teacher leaders' collective recognition of

non-leaders' perceptions of them influences their relationships with non-leaders. As Ella

summarized, "These [non-leaders] don't really like us or respect what we do. How can we ever

garner collegial relationships with them?"

I empathize with Ella and other informal teacher leaders who believe non-leaders do not

endorse informal leadership behaviors. Also in my experience, colleagues who have chosen not

to lead sometimes communicate their displeasure with teachers who remain willing to lead

informally.

The next section of this chapter reports on principals' and non-leaders' actual perceptions

of informal teacher leaders. In many instances, both principals' and non-leaders' perceptions of

informal teacher leaders mirror informal teacher leaders' beliefs about how their supervisors and colleagues perceive them.

6.3 SCHOOL PRINCIPALS' AND NON-LEADERS' PERCEPTIONS OF INFORMAL TEACHER LEADERS

Both school principals and non-leaders readily offered their opinions of informal teacher leaders or their behaviors. As stated above, principals' perceptions of informal teacher leaders correspond to informal teacher leaders' beliefs about how their principals perceive them. And in many instances, non-leaders' perceptions of informal teacher leaders matched those leaders' suspicions about how they are perceived by colleagues who choose not to lead. This information is detailed in the following two sections of this chapter.

6.3.1 Principals' Perceptions of Informal Teacher Leaders and Their Roles

Both Steve and James perceive informal teacher leaders and their roles similarly. Despite leading schools with extremely different cultures (School culture as a possible influence upon informal teacher leadership is discussed in Chapters 4 and 7), both principals conveyed a clear message: They could not operate their buildings successfully without the assistance of their informal teacher leaders. Steve and James highly respect their informal teacher leaders, and the work they do to improve student achievement and strengthen their respective organizations and surrounding communities. To illustrate their perceptions of informal teacher leaders, both

principals described specific situations during which informal teacher leaders assisted them tremendously.

For several seconds, Steve thought deeply about his response to the question, "How do you perceive the informal teacher leaders in your building?" He responded:

> I perceive these teachers as, uh, I guess having an inner feeling to do well – a desire to try their best and give 110 percent all the time, especially when no one is around to monitor them. They share their thoughts and ideas with others. They try to better the school and students. They are, uh, reflective and very interested and improving their own skills and teaching abilities because they are not satisfied with where they're at.

During our conversation, I requested that Steve give me a concrete example of informal teacher leadership to illustrate his perception of informal teacher leaders. Before detailing the behavior of a teacher leader in his building, Steve qualified his response by informing me that the teacher he described "is a leader through and through." Steve noted:

> She takes more of an initiative…She shares ideas, looks at the whole picture of the school and the students more than just her classroom. She understands her professional responsibilities and prioritizes them more than any other issue. She is very conscientious of the student and always, always looking to improve her practice…Last year, our professional development focus was on differentiated instruction. This leader would help with the goal setting process of the others around her and have a common vision for the school.

While describing the informal teacher leaders in his building, Steve offered information about his relationship with them. Consequently, he spoke about how his relationship with informal teacher leaders and non-leaders differs. Steve explained:

241

I tend to float towards [the informal teacher leaders] more. When I say, "float," um, I'm around them more. I'm in their classrooms more…I have to be honest: I'm just more interested in what they're doing because every time you go in there, there is something engaging, something that is great for kids. I enjoy being there to tell you the truth. Um, I tend to get their opinion more. I would ask for their suggestions, their opinions, their recommendations more so than I would the others who are not leaders. I certainly respect…what they do, and uh, if I, uh, see that someone is an outstanding teacher and takes the initiative to be a leader, I have a great interest in them and their opinion more than I do another teacher who is not a teacher leader.

In sum, Steve regards informal teacher leaders as reflective, highly qualified educators who are willing to collaborate with colleagues and think beyond their own needs to discern what is best for Smallville as a whole. Steve recognizes that informal teacher leaders demonstrate fervor for the profession, care deeply for their students, and remain eager to develop professionally. He seeks informal teacher leaders' opinions more frequently than non-leaders' because to Steve, leaders' perspectives count more.

Like Steve, James also values and respects the teachers who lead informally in his building. James appreciates their willingness to stand alone as leaders of teachers who might not welcome informal leadership behaviors. James stated:

My informal teacher leaders go above and beyond. They are willing and courageous to basically stand up for what they believe in. And um, and they are willing to…be different. Sometimes, it's difficult to, uh, I think to be a leader because sometimes you get grief for doing extra. But, they don't care what other people think.

To elucidate how the informal teacher leaders in his school are willing to stand alone as leaders, if necessary, James remarked:

For example, I have an individual, who, um, in the building has done a lot of extra things for the school and district. He is very savvy technology-wise. He has created numerous, amazing video productions, and um, he has done this to the point where he has been recognized nationally. He's written chapters in two different texts. It's pretty impressive. I think he's self-motivated to do, um, for education, number one. Number two, for kids. I mean, he will go above and beyond for kids…But, he gets a lot of grief for doing this. I mean, like, other teachers have gone to him and have questioned why he's doing it and say that it makes them look bad…Sometimes you have to be willing to stand out, willing to take some grief to do what you think is right. And he is a prime example of someone who has taken it, um, over and over again because he knows it's in the best interests of the kids. I really respect him for this.

More so than for their work as educators, James remains thankful for informal teacher leaders' confidence to risk being the targets of relational bullying to do what they deem is best for children. James' primary reason for appreciating his informal teacher leaders' efforts speaks to the culture of Middleton, which is not conducive to informal teacher leadership. This differs from Steve's valuing of informal teacher leaders mainly for their work. Since Smallville's non-leaders are more receptive to informal leadership behaviors than Middleton's, Steve's perception of informal teacher leaders is linked more to their performances than to their attitudes.

During our interview, James also spoke about his relationship with the informal teacher leaders in his school. As Steve did, James inadvertently commented upon his relationship with

non-leaders while detailing how and when he interacts with informal teacher leaders. James explained:

> I probably feel the safest to go and ask [the informal leaders'] opinion about something. I probably value their opinion most. Also, to confide in. If I had a real issue with something, and if something needed to get done, that's probably who I'd ask first. With the non-leaders, a lot of times it feels like I'm "pulling teeth."

James feels more secure collaborating with informal teacher leaders than non-leaders. To illustrate this, he uttered the word, "safe." From James' word choice, I infer that he regards his interactions with non-leaders as "unsafe." Again, his statement emphasizes Middleton's "toxic culture" (Deal & Peterson, 1998) as created predominantly by resistant colleagues.

No matter the reasons for their opinions, the principals' perceptions of informal teacher leaders substantiate the informal teacher leaders' speculations about how their supervisors view them. The principals value and respect informal teacher leaders for their willingness to assume extra responsibilities, ability to diagnose organizational needs on a broad scale, and if necessary, confidence to stand alone as leaders.

Conversely, the non-leaders who served as respondents do not hold their colleagues who choose to lead in such high esteem. Although some of the non-leaders interviewed remain indifferent about informal teacher leaders' work beyond their classrooms, others displayed displeasure when asked how they perceive informal teacher leaders and their roles. This information is presented in the following section.

244

6.3.2 Non-Leaders' Perceptions of Informal Teacher Leaders and Their Roles

As explained above, the informal teacher leaders suspect that their colleagues who choose not to lead do not hold them in high regard. In actuality, the interviewed non-leaders: (a) remain indifferent to informal teacher leaders and their work, (b) fail to understand informal teacher leaders' motivation for desiring to extend their responsibilities beyond the terms of their contractual agreements; and (c) find informal teacher leaders' personal qualities and behaviors annoying. The following text offers examples of non-leaders' remarks during interviews that have led me to the above conclusions. It also provides insight into some of the non-leaders' perceptions of self.

For example, Dex regards informal teacher leaders' collective behaviors as undesirable, so much so that he struggles to avoid being inadvertently grouped with them. Dex argued:

> The informal teacher leaders are very concerned with their perceptions among this teacher crowd…They got their nose in all sorts of things…For me, whenever anything becomes, um, you know, like a real display of intellect, I feel like I shouldn't give too much [of myself] because then I would just get accidentally labeled…like I'm speaking the language of an administrator like [the informal teacher leaders] are.

Middleton's culture is such that many teachers and administrators remain in opposite camps. Dex is careful not to cross the line of distinction between "teacher" and "administrator" as he clearly believes the informal teacher leaders have.

Bill, another teacher who chooses not to lead informally, explained that he does not understand informal teacher leaders' motivation for engaging in extra-role behaviors (Organ, 1990). While discussing informal teacher leaders' behaviors, Bill mentioned that he finds them "unbelievable" (In my opinion, Bill meant this as a compliment to his colleagues who do extra).

Simply, Bill cannot imagine what might inspire a teacher to assume additional responsibilities. He qualifies his perception of informal teacher leaders by speaking about his own behaviors:

I don't do all those extra things. I don't volunteer for a lot of stuff. I value my time outside of school. I don't volunteer to chaperone dances, and I don't volunteer to do extracurricular programs….[The informal teacher leaders' eagerness] gets annoying sometimes, but it doesn't make me feel one way or the other. I know how much they do and there is no way that I could ever do that much. It is as simple as that.

During this same conversation, Bill stated that he believes the informal teacher leaders perceive him as "lazy." At the same time, he claims that informal teacher leaders' supposed perceptions of him neither inspire nor upset him.

Although Bill mentioned that occasionally he finds informal teacher leaders' enthusiasm irritating, he does not begrudge their behaviors and steps aside to allow them the freedom to lead. Conversely, Mark shows hostility toward his colleagues who choose to lead. His comments about how he perceives Middleton's informal teacher leaders support Ella's aforementioned statements detailing animosity between some leaders and non-leaders. Mark asserted:

I don't know why [the informal teacher leaders] can't just leave well enough alone. I have been teaching for a long time. It's the same old crap. The more you do, the more [the administrators] want you to do. The principals get a hold of all these teachers that are willing to do extra and just use them. Nobody is going to use me…I don't know why [the informal teacher leaders] have to constantly buck the system…I leave them alone and they know to leave me alone.

Considering the aforementioned statements, I imagine that the informal teacher leaders of Middleton surely recognize how Mark perceives their leadership behaviors, and consequently,

246

them. His comments are indicative of Middleton's culture and plainly illustrate the division among teachers, and the boundary between teachers and administrators. In essence, Mark positions himself as "the system," and he believes that informal teacher leaders "buck" him. His claim that he and the informal teacher leaders "leave each other alone" is typical of enemy behavior during a cease fire. "Leaving each other alone" appears to be the negotiated behavior so as to avoid any altercations at work.

Although the above non-leaders' harbor strong and sometimes negative opinions about informal teacher leadership, others remain indifferent to informal teacher leaders' efforts or intentions. For example, Bob explained, "I'm a hard worker, and I keep to myself…I try to do the best for my students…I may not always agree with some of the things these teachers are doing, but it's not my place. I talk to everybody." And after being asked several times to judge informal teacher leaders' behaviors, Christina never volunteered any noteworthy information on the topic. Instead, she continued to tell of how the "entire faculty hates [me] because [I] bumped another teacher from her position." Perhaps Christina remains indifferent to her colleagues who lead because when given several opportunities to disclose her perception of them, she chose to discuss a different issue. She also deliberately may have chosen to avoid disclosing examples of hostility.

In sum, the non-leaders either remain largely uninterested in the informal teacher leaders' behaviors or find them bothersome. Some of Middleton's non-leaders, who deem informal leadership behaviors exasperating, have projected their irritation onto informal teacher leaders themselves. These teachers are maddened by informal leadership behaviors and have exerted effort to avoid being labeled as an "informal leader." Furthermore, none of the interviewed non-leaders reported maintaining a collegial relationship with informal teacher leaders. Although

some non-leaders and informal teacher leaders maintain affable relationships, professional collaboration does not seem to occur between the two groups.

6.4 A SUMMARY OF RESPONDENTS' PERCEPTIONS OF INFORMAL TEACHER LEADERS AND THEIR ROLES

Informal teacher leaders' perceptions of themselves and their roles appear to influence their behaviors. Collectively, the informal teacher leaders perceive themselves as: (a) capable; (b) confident, yet reflective; (c) role models to their students and colleagues; (d) assistants to their supervisors; (e) willing to extend themselves beyond their classrooms; (f) able to maintain a strong sense of purpose; (g) influential without having to exercise power; and (h) key educators who try to move their schools and districts forward. The informal teacher leaders believe their principals respect them and their work. However, they do not feel completely supported by their colleagues who choose not to lead, and in some cases, avoid these teachers all together.

As the informal teacher leaders suspect, their principals value them tremendously. The principals regard them as essential to their schools, and feel comfortable engaging them in professional dialogue. Both principals reported that if they need advice or assistance from a teacher, then they are far more likely to approach an informal leader than a non-leader.

Finally, some non-leaders may remain indifferent to informal teacher leaders and their work. Others fail to understand why informal teacher leaders volunteer to do extra. Still, others appear irritated or annoyed by informal teacher leaders' efforts to challenge the status quo.

Depending upon the type of school culture present, both principals' and non-leaders' perceptions of informal teacher leaders – whether actual or perceived – might influence informal

248

teacher leaders' or prospective informal leaders' willingness to extend themselves beyond the terms of their contractual agreements. This aspect of the phenomenon is explored in the next chapter.

7.0   REPORT OF FINDINGS: CONDITIONS THAT EITHER PROMOTE OR HINDER

INFORMAL TEACHER LEADERSHIP

In Smallville and Middleton, certain factors either promote or hinder informal teacher leadership. This chapter explores the factors, and addresses the question: "How, when, and why might some teachers develop into informal teacher leaders while others do not?"   Specifically, Chapter 7 considers the internal and external conditions that either encourage or dissuade teachers from engaging in the organizational citizenship behaviors (Organ, 1990) required to move their schools forward and affect change during this era of school reform. Although the interviewed informal teacher leaders claim to remain self-motivated to engage in organizational citizenship behaviors, their administrators and school cultures may significantly influence the growth of potential informal teacher leaders. Perhaps their administrators and school cultures even influence them unknowingly.

The chapter is divided according to the common theoretical codes that emerged as data were analyzed: (a) informal teacher leaders' paths to leadership; (b) factors that either promote or hinder informal teacher leadership; and (c) informal teacher leaders' advice for administrators who wish to promote and sustain informal teacher leadership in their schools. The following section describes informal teacher leaders' paths to leadership, including the intrinsic and extrinsic factors that have influenced them to go beyond the terms of their contractual

agreements for no compensation in the form of time or money, and therefore demonstrate the organizational citizenship behaviors (Organ, 1990) outlined in Chapter 5.

7.1   INFORMAL TEACHER LEADERS' PATHS TO LEADERSHIP

The interviewed informal teacher leaders took various paths to become the leaders they are. Although some served as informal leaders in diverse contexts throughout their lives, others learned to lead on the job. Some have been inspired to lead by former educators, colleagues, and/ or conditions within their schools, and others have been motivated to lead as a result of their upbringing (Inevitably, this section of Chapter 7 touches on conditions within the schools that either promote or hinder informal teacher leadership; however, the subject is explored in greater detail in Section 7.2). Nevertheless, all interviewed informal teacher leaders made one point very clear: No matter the path that led them to act as informal leaders, they now remain self-motivated to exceed expectations. Many claim always to have possessed an innate drive to do more.

For the informal teacher leaders, their paths to leadership have been paved by self-motivation. Simply, they desire to do more, and the desire is innate. They are reflective about their respective practices and continually strive to improve as professionals. In many instances, the motivation to develop professionally and even personally has influenced informal teacher leaders' lives long before they were hired at Smallville or Middleton. David illustrated this point when he described his path to leadership before working as a middle school teacher. David said:

> I'm a military person. When I entered the military, I was young and immature. Still, I
> wanted to do more. All this paints a picture of why, why I became the person that I

251

became. I saw flaws in myself and the system when I was in the military. I saw where I

was at when I entered and where I was when I left. That led me to wanting to do more as

a teacher than anyone had ever done for me.

Once hired, David's behavior as an informal teacher leader may have been an extension of the

leadership responsibilities he assumed while active in the military. Because he desired to grow

as an individual, he voluntarily joined an institution that encouraged leadership. His military

experience, coupled with his innate desire to "achieve more," seems among the reasons why

David continues to lead informally at Middleton.

However, David noted that his daughter, to whom he attempts to relate, also has inspired

him to lead informally. David explained that he has been "unable to connect" with his daughter,

who currently struggles to achieve in her mathematics class. Hopefully to discover ways "to

help [his daughter] learn and enjoy math," David volunteered to tutor math students after school

"to share that knowledge with the kids in the hopes of getting to [his] own daughter." During

our conversation, David mentioned, "The birth of a child always makes people want to do more

and be more." Although David appears self-motivated to lead, his daughter's needs provide

some extrinsic motivation that keeps him willing to assume informal leadership responsibilities

and engage in organizational citizenship behaviors (Organ, 1990) that actually benefit his school

organization as a whole (Podsakoff et al., 2000).

Joan, an informal teacher leader who prides herself on "being a problem solver," also

discussed a path to leadership that began prior to her work at Middleton. Joan explained:

[My path to leadership] is part of the way I was raised. We were taught to, you know,

taught that if you weren't going to solve a problem, then you weren't gonna complain

about it either. If you're not willing to change something, then don't complain about it.

252

But otherwise, if you're gonna complain about it, then you have to put yourself out there

and work toward a solution to the problem that you're complaining about.

As a child, Joan was taught to be a "good sport" by maintaining a positive attitude to solve

problems – an organizational citizenship behavior (Podsakoff et al., 2000). Today at Middleton,

she continues to "work toward solutions" to improve her school. Joan's behavior is consistent

with Oplatka's (2006) discovery that teacher leaders consider the needs of their school

organizations and act accordingly.

Joan's parents – particularly, her mother, "who for her time period was out doing things"

– taught her from an early age that leading to affect change is critical. Joan spoke about her

mother's early influence upon her as an informal leader:

[Joan's mother] did all kinds of things because she was a business owner in the

community, and she felt that, you know, if you were going to have that kind of

responsibility in the community, then you need to give back. And so, that was part of

what I was raised doing: giving back and doing extra. I mean, that's what you did; that's

what we do. We involve ourselves in public service. I think this is one of the things that

has motivated me [to become an informal teacher leader].

As a child, Joan was taught "civic virtue" – an "organizational citizenship behavior (Podsakoff et

al., 2000). She learned how to participate actively in governance, express her opinion, and

consider the needs of her community before her own. Essentially, Joan's desire to lead

informally was ingrained by the time she was hired as an educator.

Lydia, however, believes that she literally was born with a willingness to lead. Lydia

commented:

I have had the tendency to lead from Day 1 of my life. I mean, we have pictures of us as kids and we went for a walk at the wild flower reserve. We were there with my mom and a bunch of other kids, and there I am at the front of an entire pack of people – leading the way! It was just the personality I was born with. I was co-chair of orientation for two years in college; I was an RA for two years; I ran a dorm when I was student teaching. I like to be in charge. I like to be running things. I like to be getting things done and from Day 1, that was just who I was.

After discussing her innate drive to lead, Lydia mentioned that as part of her graduate studies, she recently had been trained in the "art of leadership." She chuckled when she informed me how the training provided her with an opportunity to reflect upon her teaching practice because with every example of leadership behavior Lydia thought, "Yep. I do that!" Lydia found her graduate courses on leadership to be rewarding since the professors' examples of leadership validated her behavior.

Like David, Joan, and Lydia, Anna also helped me to understand her willingness to lead informally. However, Anna credits her former teacher with assisting to shape her as a leader. Below, Anna described her relationship with this educator:

I had an elementary teacher that I loved. She was a physical education teacher. She was the first teacher who pointed me out, pointed positive things about me out. She was just a real positive influence on my life, and it was one of the only teachers who did that consistently for me in elementary school. So, instantly, I knew I wanted to be a teacher because of her. When I became a teacher, I also wanted to be a teacher like her.

Anna possessed a desire to lead but did not demonstrate leadership behaviors until her former teacher recognized her capacity to lead, and assisted Anna in developing her leadership skills.

Because of her teacher's consistent positive reinforcement and encouragement, Anna not only was stirred to lead but also was motivated to model her teaching style after her mentor's. Anna believes that her students benefit from the lessons she learned from her mentor.

Like Anna's, Gabrielle's development as an informal leader was linked with her desire to teach. Gabrielle acknowledged that like others interviewed, she behaved as a leader early in life. Additionally, Gabrielle shared how her will to lead fused with her aspiration to teach. When cued, "Tell me how you became the leader you are," Gabrielle offered:

> It's just me. I [lead] for a fulfillment for myself…I like to try something different…I want to learn; I want to try things; I want to experiment…Once I started college I learned that when I really tried, I became successful and when I tried I was successful. That became a stepping stone for me. I earned this "A" and that "A" and all of a sudden…I was making straight "As"! And that was my defining moment. When you start expecting more of yourself, once you become successful at something you just expect more and expect more. That's just kind of how I do everything now…And I decided to become an educator because I wanted to make a difference in lives and be able to show my leadership skills with students, and teach them the difference between right and wrong, and how to become successful in life.

Essentially, Gabrielle distinguished a connection between effort and accomplishment. As she put forth more effort, she achieved more success. Eventually, her wish to thrive grew from a personal desire to an organizational citizenship behavior (Organ, 1990) that benefits her students as learners. Similarly to Joan, Gabrielle looks beyond her own needs to consider the needs of others. By modeling ethical behavior and teaching students that effort leads to success, Gabrielle also demonstrates "civic virtue" (Podsakoff et al., 2000).

All aforementioned teachers remain motivated to lead. They also were encouraged to lead either purposefully or indirectly by another individual – a child, parent, or mentor. Joe, conversely, was driven to lead informally by experience – working as a member of the corporate world for a number of years prior to teaching, and by living for several years in the community where he works. During our discussions, he described: (a) his innate drive to lead; (b) how leading during his previous career has influenced his role as an informal teacher leader; and (c) how being a long-time member of the community in which he teachers has prompted him to assume extra responsibilities. Joe explained:

> [Being a leader] is just the way I am; it's just the way I am with everything. I've been a volunteer fireman for 30-some years; I've coached little league, pee-wee football, soccer leagues for the kids, have helped with Easter egg hunts…It's impossible for me to walk past someone and not help…I never went into this job saying, "I want to be a leader." I went into this job saying, "I want to be the best teacher I can be in my area, in my content, in my concentration."…In all the years I've taught, no [administrator] has ever told me to do anything; instead, they ask me. In the business world, they tell you to do it and if you don't, they just get rid of you…I appreciate [being asked to do something in lieu of being told], and I appreciate that [teaching] is more than just a job. It's the school; it's the kids. I've known a lot of these kids since they were born. For me, it goes deeper than just teaching. I have a real connection to this community.

Joe's devotion to his community has prompted a loyalty to his school. According to Podsakoff et al. (2000), a demonstration of loyalty to one's organization constitutes an "organizational citizenship behavior." Joe's appreciation for the school and community manifests as informal

teacher leadership. As explained in Chapter 5, when making decisions regarding education, Joe assesses the needs not only of his students but of community members as well.

No matter their specific journeys, all interviewed informal teacher leaders acknowledge a strong motivation to lead. Joe substantiated the notion of self-motivation as the impetus to informal teacher leadership by explaining, "When [Steve] recognizes me, I am very happy about that. But, I can go on living and working just the same if no one ever came in and said, 'I appreciate what you're doing'." Today, their apparent self-motivation initially may have been instilled by a parent or organization that taught them the value of exceeding expectations. Or the innate desire to exceed expectations always may have been a part of who they are as individuals. Whether urged directly by a teacher during their formative years or encouraged indirectly by the needs of a particular child or the community at large, these teachers eagerly assume informal leadership responsibilities and demonstrate a loyalty to their schools.

Ironically, some respondents do not always feel confident about their assumption of extra responsibilities even though they continue to lead informally. Although a number of factors contribute to informal teacher leadership, certain conditions within Smallville and Middleton actually may dissuade other teachers from acting as informal leaders. Both factors that promote and hinder informal teacher leadership are explored below.

7.2   FACTORS THAT EITHER PROMOTE OR HINDER INFORMAL TEACHER LEADERSHIP

Although the interviewed informal teacher leaders are self-motivated to demonstrate organizational citizenship behaviors (Organ, 1990; Podsakoff et al., 2000) despite the conditions

explored in this section of Chapter 7, they enthusiastically commented upon the aspects of their school organizations that: (a) prompt them and their colleagues to assume informal leadership responsibilities; and (b) discourage them and their colleagues from leading informally (even though they continue to lead despite the reported discouragement). Conditions that either promote or hinder informal teacher leadership are addressed briefly throughout Chapters 4 through 6, for to report on the above aspects of the phenomenon without alluding to these issues would be impossible since the data are interrelated. But, this section is devoted entirely to a discussion of factors that contribute to informal teacher leadership and barriers that impede its development. Ironically, the factors that promote and hinder informal teacher leadership are the same.

7.2.1   Factors that Contribute to Informal Teacher Leadership

To discover the factors within Smallville and Middleton that contribute to informal teacher leadership, I discussed the issue most thoroughly with informal teacher leaders. Although the teachers who choose not to lead might have been able to speculate upon which factors possibly encourage their colleagues to lead, none of the factors persuaded them to lead. Thus, in order to report this aspect of the phenomenon accurately, I include in this section an analysis of only data gleaned from interviews with informal teacher leaders.

When prompted, "Describe the conditions within the school that encourage you to lead informally," teachers offered a number of responses that were consistent with researchers' findings. According to the research, the most obvious factors that encourage teacher leadership within school organizations include: school culture (Beachum & Dentith, 2004; Hargreaves, 1999; Harris, 2003; Hart, 1994; Kardos et al., 2001; Lambert, 2005; Muijs & Harris, 2007;

Pechman & King, 1993) and administrators who distribute their leadership responsibilities (Elmore, 2000; Spillane et al., 2001) to teachers whom they identify as leaders (Whitaker, 1995), and support through professional development and shared decision making processes (Muijs & Harris, 2007). The interviewed informal teacher leaders noted both their principals and schools' cultures as factors that sustain their leadership.

Since administrators often are perceived as the leaders or creators of school culture, it is rather difficult to separate these two factors known to promote informal teacher leadership. Therefore, in some instances, the following discussion is all encompassing. But, for the purposes of organizing this section of Chapter 7, the section is divided further according to the two factors that encourage informal teacher leadership – administrators and school culture.

As detailed in Chapter 4, Smallville appears to maintain a school culture far more conducive to informal teacher leadership than Middleton. For this reason, much of the data reported in Section 7.2.1 were gleaned from interviews with informal teacher leaders of Smallville. Consequently, most data discussed in Section 7.2.2 about barriers that impede informal teacher leadership were gathered from interviews with educators who work in Middleton.

7.2.1.1 Administrators as Positive Influences on Informal Teacher Leadership

According to most informal teacher leaders, their school principals greatly influence their willingness to exceed contractual expectations. If these teachers feel supported and appreciated, then they report being far more likely to continue engaging in informal leadership behaviors. As Ella stated, "A little 'thank you' goes a long way with teachers like us." And David said, "People will work for a principal who does a good job and is not 'nit-picky'." To David, a principal who monitors teachers' behaviors too closely without giving them creative freedom

sends the message that he/she does not trust his teachers as professionals. In turn, teachers do not appreciate "being micro-managed."

Below, Gabrielle discussed why she feels supported by her boss, and how his support drives her to lead. She explained:

> Steve comes into my room and always has positive things to say. When there is something to be done, he asks, you know, what I think. I mean, the endless, "Thank yous," that go on! You know, it's the rapport that's built. [The administrators] can turn to me for a question to ask, or they turn to you for congratulations, or they can turn to you for a suggestion. Steve feels comfortable knowing that I will take his constructive criticism and his complements and turn them into a useful benefit for me and my students.

Gabrielle feels Steve's support when he verbalizes his appreciation for her efforts. Because she perceives Steve as encouraging, she "will take his constructive criticism." Perhaps informal teacher leaders like Gabrielle might not internalize constructive feedback from administrators whom they deem unsupportive. Regardless, the positive relationship that Gabrielle maintains with Steve helps her to think less about her own feelings in regard to criticism and more about how she might channel Steve's feedback to develop professionally.

Likewise, Ella reports "a definite connection and feeling of support from administration." While discussing a new professional development initiative and how she and her supervisors have worked cooperatively, Ella frequently said "we" to illustrate that she and her superiors are equally as invested in school reform. Ella also mentioned that because James "has really gone out of his way to make [her] feel like part of the team, and explained how to do [the professional development initiative]," she feels like she "wants to do good work for him." Because James has

260

garnered a positive relationship with Ella, she is eager to work industriously to please him and move her school district forward.

Anna also reports feeling a personal connection with her principal. Additionally, Anna feels very comfortable working with the school district's superintendent, who used to be the school's principal. When asked to comment on how her principal influences her to lead informally, Anna spoke about both her principal's and superintendent's effect on her as an informal leader. She reported:

> I have open communication with [the principal]. I can communicate with him and I can talk to him. When I want to do something extra or try something new, he always supports me…I feel like I have a very strong relationship with our superintendent. I'm her "go to," you know, when she needs something done…even anything extra in school, she knows she can come to me, call on me…She always says to me, "It takes a woman in your department to get things done."…I definitely feel like we're all on the same page…The superintendent and principal know that if they need me to do something, then it's gonna get done…I like that recognition; I'm glad I'm their "go-to" person.

Referring to the same superintendent as Anna, Lydia also feels a bond with this former school principal. In addition to Lydia's willingness to lead as a result of wanting to please her superintendent, who she describes as "really like a friend," Lydia also leads because she wants to emulate the behavior of this woman who has served as her mentor. Lydia explained, "She always does so much in the school…She would never expect you to do something that she wouldn't do or hasn't done…It's very hard to say, 'No,' to that."

Similarly, Joe mentioned that he appreciates his administrator's modeling of leadership behaviors, and how this inspires him to lead as well. He commented:

261

I always tell people about our principal, who would never ask you to do something that they wouldn't do. This is one of the reasons why I go into teaching. I always tell people about Steve, who is the epitome of a leader. I never feel like I am being taken advantage of. I would do anything for Steve because Steve would do anything for all the teachers.

The informal teacher leaders clearly value the positive rapport they maintain with their administrators who encourage, support, and instruct them. Additionally, they reported having a sincere appreciation for any administrator who engages in the following behaviors: (a) being visible throughout the school; (b) visiting their classrooms regularly; (c) praising good work; (d) acknowledging informal leadership behaviors beyond contractual expectations; and (e) addressing colleagues' incompetence or refusal to adhere to the terms of the teachers' contract, if necessary (This issue as an influence on informal teacher leadership is explored more thoroughly in Section 7.2). According to the respondents, administrators can promote and sustain informal teacher leadership by modeling leadership behaviors and maintaining a good rapport with their teachers, who, consequently, may be willing to assume extra responsibilities to please a superior whom they genuinely like and respect.

Because administrators foster relationships with and among teachers, they substantially influence school culture. The following section explores aspects of school culture that encourage informal teacher leadership.

7.2.1.2 School Culture as a Positive Influence on Informal Teacher Leadership

School culture greatly influences informal teacher leadership (Beachum & Dentith, 2004; Hargreaves, 1994; Harris, 2003; Hart, 1994; Kardos et al., 2001; Lambert, 2005; Muijs & Harris, 2007, Lemlech & Hertzog-Foliart, 1992). Informal teacher leadership is far more likely to flourish in schools where the culture is collegial in lieu of balkanized (Hargreaves, 1994).

262

For the purposes of this study, "school culture" is used as a general term. Because I did not want to sway respondents' thoughts, I simply urged them to tell me about the school's culture and how it might promote informal teacher leadership. As presented in Chapter 4, the culture of Smallville is, by far, the most collegial of the sampled school settings. Thus, the following information regarding school culture as a positive influence on informal teacher leadership was gathered primarily from interviews with informal leaders of Smallville. Nevertheless, Middleton's informal teacher leaders are able to recognize glimpses of their school's culture that encourage teachers to engage in extra-role behaviors (Organ, 1990). These factors are detailed below.

For Anna and Lydia, "it's the kids" who make them lead informally. The needs of Smallville's students drive some teachers to work harder than they might otherwise. Lydia said, "I want the kids to have good experiences…They don't have a lot of outside experiences…It makes me want to keep giving them experiences they wouldn't have otherwise." Informal teacher leaders like Anna and Lydia gain energy by knowing that their leadership behaviors benefit children. Although the culture of their school is such that colleagues display some animosity toward each other on occasion, the culture unites educators when they rally around one aspect of it: the students' needs. Because respondents perceive Smallville's students as quite needy (as reported in Section 4.1), any teacher who displays a willingness to assume extra responsibilities for the sake of meeting students' physical and emotional needs is supported wholeheartedly. Colleagues may feud over issues of professional development, for example, but when helping students meet their basic needs, everyone seems to support teachers' behaviors that directly affect students' physical and emotional health.

This does not mean that every teacher at Smallville is willing to lead informally, for many have chosen not to lead. Instead, what I discovered is that the non-leaders, who occasionally will challenge informal teacher leaders for volunteering to do extra, support their colleagues who lead informally if their efforts are directed toward students and are tangible. For example, informal leaders who have fed or clothed needy students are perceived as good-natured nurturers, but teachers who have shown an interest in developing professionally – and thus have collaborated with administrators – are perceived by non-leaders as "being on the 'A Team' [Administrative Team]" or "one of *them* [the administrators]."

Hence, in addition to students' needs as positive influences on informal teacher leadership, supportive colleagues seem to be an extremely strong influence on teachers' willingness to lead informally and publically demonstrate various domains organizational citizenship behaviors (Podsakoff et al., 2000). Some informal teacher leaders commented on how their colleagues occasionally encourage them to lead. For example, Anna explained how her colleagues' recognition of her as a leader is validating and inspiring:

> I like stepping up my game and other teachers seeing it…I like the recognition I get from them because I want them to think, "You know, I can probably [lead] too."…I like seeing the kids succeed, and I like when the staff says, "Oh, that really made our school a better place.

In sum, support from administrators and colleagues, as well as students' needs, appears to shape the cultures of Smallville and Middleton. All work together as factors that promote informal teacher leadership. Nevertheless, according to all respondents, far more factors present within their respective schools ultimately hinder informal teacher leadership. This aspect of the phenomenon under study is explored at length below, for if barriers to informal teacher

264

leadership can be identified, then administrators might develop a better understanding of how they can rid their schools of such obstacles.

7.2.2 Factors that Hinder Informal Teacher Leadership

To discover the factors that hinder informal teacher leadership, I spoke with both informal teacher leaders and non-leaders. I also discussed this issue with the two school principals who served as respondents because they were able to speculate on what appears to be the biggest hindrance to the cause – adversarial relationships among colleagues that result in a balkanized school culture (Hargreaves, 1994).

Resistant colleagues are among the greatest hindrances to the development of informal teacher leaders (Muijs & Harris, 2007). Other barriers include: (a) administrators who refuse to relinquish some of their authority and responsibilities to teachers (Barth, 2001; Goldstein, 2004; Harris, 2003, 2005; Lashway, 1998; Muijs & Harris, 2007); (b) "toxic" school cultures (Deal & Peterson, 1998); (c) time and a lack of financial incentive (Barth, 2001; Blegen & Kennedy, 2000; Muijs & Harris, 2007); and (d) teachers' inexperience as leaders (Muijs & Harris, 2007).

I must note that neither administrators' refusal to distribute leadership responsibilities nor teachers' inexperience surfaced as potential hindrances to informal teacher leadership at Smallville or Middleton. First, both Steve and James happily invite teachers to assume leadership responsibilities. As explained in Chapter 4, the interviewed principals strive to recognize prospective informal leaders and invite them to assume extra responsibilities accordingly. Furthermore, all interviewed teachers indicated that their respective school principals indeed distribute their leadership whenever possible. Next, teachers' inexperience as leaders does not seem to affect informal teacher leadership at Smallville and Middleton.

Although I did not ask respondents a direct question regarding inexperience as a possible barrier to informal teacher leadership, no participant had mentioned this factor while responding to a number of open-ended questions and prompts designed to uncover all potential obstacles to informal teacher leadership. Moreover, Table 26 indicates that both informal leaders and non-leaders who served as respondents range from novice to veteran; therefore, in regard to this study, inexperience does not seem to be a barrier to leadership.

Hence, this section of Chapter 7 focuses on the three most dominant disruptions to informal teacher leadership present in Smallville and Middleton: (a) a lack of time for teachers to lead informally; (b) "ungrateful administrators," as perceived by teachers; and (c) school culture as created by resistant colleagues. This section is divided according to these obstacles.

7.2.2.1 Time as a Hindrance to Informal Teacher Leadership

Of the three hindrances to informal teacher leadership at Smallville and Middleton, "time" proved to be the least significant. Time as a barrier to informal teacher leadership can be summarized by reporting that non-leaders claim they might assume informal leadership responsibilities if they "had more time" during their work day. Their assertions are consistent with the findings of Barth (2001), and Muijs and Harris (2007), who discovered that "teachers have a full plate" and often, they just do not have time to lead informally. When I asked the non-leaders to tell me why they feel as if they do not have time to lead informally, none were able to give me a specific reason. However, Mark did offer: "[The administrators] just place so many demands on teachers." Apparently, Mark feels as if the expectations for teachers established by the terms of the teachers' contract are challenging, and that assuming extra responsibilities would be entirely too overwhelming.

The non-leaders also justify their unwillingness to lead informally either by questioning informal teacher leaders' ability to do their jobs during the time allotted, or assuring me that their personal time is "more valuable." For example, Bill contended that his time "is very important," and that after working he looks forward to engaging with friends, exercising, and deescalating from the stresses of the job. Bluntly, Mark asserted that "the last thing [he] wants to think about after work is work."

Both Bill and Mark also suggested that a hallmark of good teaching is a teacher's ability "to get the job done during school." Bill inquired: "What is wrong with these people who have to take a ton of work home or are here long after work lesson planning or whatever?" Bill perceives some informal teacher leaders as inept because they "can't get their work done at work." His questioning of informal teacher leaders' use of time leads me to conclude that Bill does not hold informal teacher leaders in high regard (Non-leaders' perceptions of informal teacher leaders are addressed in Chapter 6).

7.2.2.2 Administrators as a Barrier to Informal Teacher Leadership

As explained above, informal teacher leadership flourishes in schools where teachers perceive their administrators' behaviors and interactions with them as positive and supportive. Conversely, administrators can also hinder the growth of informal teacher leadership. According to Acker-Hocevar & Touchton (1999), administrators have a responsibility to initiate and sustain a school culture that promotes teacher leadership critical for lasting school reform. Administrators might do this by: (a) helping teacher leaders define their informal, abstract roles (Buckner & McDowelle, 2000); (b) identifying teachers with the capacity to lead (Whitaker, 1995); (c) providing professional development for teachers (Harris, 2003); (d) expecting all teachers to lead (Blegen & Kennedy, 2000); and (e) shaping patterns of teachers' interaction

(Hart, 1994). Nevertheless, sometimes administrators might believe they are doing everything suggested to promote informal teacher leadership while teachers perceive their actions as hindrances to the cause.

For example, both Steve and James claim that they expect teachers to lead, continue to identify teachers with obvious leadership ability, and then encourage those teachers to assume extra responsibilities. Some informal teacher leaders, however, believe that their principals rely only upon them to "run the show," and never attempt to distribute leadership responsibilities to any other colleagues. As Anna explained, "Some teachers are just not held accountable by the District." When asked to speak about her relationship with administrators, Anna continued:

> [The administrators] know that if something needs to get done, they can come to me first which is great, but you know, it can also be frustrating. Sometimes, I'm doing it all and two other people are not doing anything. You know, it's definitely sometimes you just hit your breaking point. Like, "Oh, you can keep piling things on." And when they say it's department related and I'm the only one doing it all the time, then part is like, discouraging. And I think they know what's going on but they don't know how to break that cycle.

Anna contends that her administrators only distribute responsibilities to her and a few colleagues who perpetually undertake leadership tasks. Although she admits to resenting "always being the 'go to' person," she continues to lead. Anna's desire to please her administrators and improve student achievement may overshadow any resentment because despite her frustrations, she "never [says] no."

Lydia agrees with Anna that administrators' distribution of leadership responsibilities among teachers is unequal. Although like Anna, Lydia continues to lead informally despite her

irritation. She asserted: "Administrators have the motto that…[teachers] have to 'wear many hats.' I think sometimes with those of us that are teacher leaders it's just expected of us to wear many hats." During our discussion, Lydia described her teaching schedule as "exhausting" because daily she instructs seven different classes filled with students ranging from second through twelfth grade. She became increasingly aggravated as she explained how she believes her administrators fail to support her desire for a new teaching schedule even though she continues to do anything they ask of her. Lydia said:

[Administrators] stick seven classes on me a day…But, [administrators] need to be an advocate for me. So, sometimes I feel it's very one-sided – that I do a lot for them. I feel very close to them; I like them a lot as a person. But, then it's like, "You need to back me up so my schedule is what it should be so that every year at the beginning…I don't have to come in with more union representation to get more prep time." But, then they will come to me and say, "Help me out. Come to this interview…because nobody else can make it." And I'm like, "Sure. Ok!" But, on the flip side, they are never cutting you any breaks. I just have to "wear many hats."

Even though they believe leadership responsibilities are not allocated equally among capable teachers, Anna and Lydia continue to lead through their frustrations. Ella, who also claims that her principal does not assign leadership tasks equally, persists to lead informally as well. However, Ella realizes how her principal's behavior might hinder informal teacher leadership, in general. She asserted this about the principal's seeming unwillingness to distribute leadership responsibilities equally:

It irritates the hell out of me even though I continue to do anything that is asked of me. I don't know how much longer I, um, am going to be…willing to do that. There might

269

come a day when I say, "No. Find some other sucker. I am sick of it always being me."

I have already seen one lady in my building stop doing extra because she was sick of

being the only "go-to" person. I can totally see…how you start to feel used.

All informal teacher leaders who offered their insights regarding how administrators

might hinder the growth of informal teacher leadership shared their resentment about "always

being expected to do everything." Ella, however, also spoke of how her principal shapes patterns

of teachers' interactions, and how these patterns might be an obstacle to informal teacher

leadership at Middleton. Her description of (patterns of) teachers' interactions simultaneously

details Middleton's balkanized, territorial, and "toxic culture" (Deal & Peterson, 1998). Ella

shared:

> [James] seems like he's trying hard to get along with [the male teachers]. There is
>
> tension in the district, I think, between the male and female teachers. I think
>
> that…some…a good amount of the male teachers feel that their roles are more dominant
>
> in the school. They all work right next to each other. The principal ought to move them
>
> away from each other. Divide and conquer! I have no clue why he doesn't.

Ella professes that by permitting these teachers to work alongside one another, her

principal shapes their patterns of interaction that hinder informal teacher leadership. As she

explained, "Even if one of [the male teachers described above] wanted to undertake some kind of

leadership, they would be too afraid to do it for fear that their buddies would make fun of them.

And they would." Ella's recognition of how such patterns of interaction among colleagues

impede informal teacher leadership is consistent with the findings of Hart (1994), who learned

that informal teacher leaders will respond to the ways in which their administrators assimilate to

their schools' cultures. Additionally, Ella's suggestion that the principal "do something about

the 'Boys' Club'" is representative of the interviewed informal teacher leaders' collective dismay regarding how their principals often fail to address their colleagues' – namely, the non leaders' – inappropriate behavior.

As discussed in the following section, resistant colleagues are among the largest obstacles to informal teacher leadership at Smallville and Middleton. However, administrators' failure to address resistant colleagues' inappropriate or counterproductive behaviors seems to be an encumbrance to informal teacher leadership in the school environments studied. At least once during each interview, every informal teacher leader admitted that he/she wishes the school principal would somehow address non-leaders' inappropriate behaviors, which include: (a) refusing to adhere to the terms of the teachers' contract; (b) displaying negativity; and (c) bullying those willing to lead. As Ella mentioned:

> If someone does something stupid or inappropriate, [teachers] all get a memo in our mailbox. If someone isn't doing their job, we all get an email reminder to "come on time," or "stand in the hall between classes." I don't know why [the administrators] can't just go to that person and discipline them. This is very disheartening to me…It makes [informal teacher leaders] want to quit doing extra because we think, "What's the point? 'So and so' literally does nothing, doesn't get in trouble for it, makes the same or better salary than we do, and has much less stress." Of course, we keep on doing extra, but it's frustrating. It doesn't exactly make us feel appreciated.

In sum, the interviewed informal teacher leaders agree that their administrators do far more to promote informal teacher leadership than to hinder it. However, if administrators wish to communicate to their informal teacher leaders that they do appreciate, support, and respect them, the informal teacher leaders assert that their principals might want to: (a) distribute more

271

leadership responsibilities to other capable colleagues; (b) break negative patterns of interactions among teachers – particularly, non-leaders; and (c) address issues of non-compliance or undesirable behavior directly so as not to discipline the entire staff in lieu of only those who need disciplined.

Although I alluded to aspects of Smallville's and Middleton's cultures throughout the text, the following section addresses the notion of school culture being an impediment to informal teacher leadership. Because interactions among educators shape the cultures of their schools, the next section reports on behaviors of teachers that create an environment that quite possibly inhibits informal teacher leadership.

7.2.2.3 School Culture and Resistant Colleagues as a Barrier to Informal Teacher Leadership

Resistant colleagues are among the most obvious barriers to informal teacher leadership (Ackerman & MacKenzie, 2006; Barth, 2001; Johnson & Donaldson, 2007; Muijs & Harris, 2007). Often, a clash between teacher leaders' natural, collaborative styles and the top-down, bureaucratic norms of schools result in disunity among colleagues (Lieberman & Friedrich, 1995). This is not the case in the schools studied because both principals fervently invite informal leadership. Instead, the professional risks involved in leading stem from colleagues' noticeable disapproval of some informal leadership behaviors (as discussed in Section 6.3.2).

When prompted to "explain elements of the school's culture that you believe hinder informal teacher leadership," informal teacher leaders provided much evidence to support researchers' arguments that colleagues often present a challenge to those volunteering to lead. In addition to the incidences of animosity described above, the interviewed informal teacher leaders reported numerous others. For example, Chloe explained, "If you stay a little bit later, or if you

come a little bit earlier, it's noticed." When I asked her how she knows that informal leadership

behaviors are noticed, Chloe argued:

It's been said flat out. It's been questioned. Or you'll hear it questioned about other

teachers in the building. They say, "Why are you doing this? Is there a need because

you're not capable of doing the things you need to be doing in the time frame you're

given?"

Chloe is correct, for informal leadership behaviors are, indeed, questioned by her

colleagues. During an interview, Bill mentioned that he cannot imagine what might motivate a

colleague to assume extra responsibilities and actually suggested: "Maybe they [the informal

teacher leaders] are unable to get their work done on time."

Lydia also told of "condescending remarks" from non-leaders who question her

intentions as an informal teacher leader. Lydia reported that her colleagues have said: "Oh,

she's doing *that* again," or "Oh, she won another reward." She also claims that colleagues

accuse her of being her administrator's "BFF [best friend forever]" or "daughter." The non-

leaders' perceive informal teacher leaders more like administrators that colleagues. This division

clearly illustrates balkanization among teachers, and between teachers and administrators – the

exact kind of "toxic culture" that hinders informal teacher leadership (Deal & Peterson, 1998).

Similarly, Joe notices a clear division between informal teacher leaders and non-leaders,

but he also attests that this separation is most obvious between newly hired informal teacher

leaders and veteran teachers who choose not to lead. Joe explained:

The older teachers look at the younger teachers and if a younger teacher wants to come in

and and start exhibiting these leadership qualities, some may be taken aback by that and

say, "Who do they (the younger informal teacher leaders) think they are?"

273

The culture Joe described is "veteran-oriented" so that concerns and habits of experienced non-leaders determine professional norms (Kardos et al., 2001). In addition to harboring territorial groups comprised of informal teacher leaders and non-leaders, Joe believes that his school's culture is further balkanized to pit veterans against novices.

Gabrielle also attests that relational bullying among colleagues frequently occurs. Like her fellow informal teacher leaders, Gabrielle does not allow non-leaders' behaviors to influence hers; however, she claims to know, for certain, that the non-leaders find her "obnoxious" because of "the looks [she] got over the years." Similarly, Ella professes to have earned "many looks" from colleagues who do not approve of her informal leadership behaviors. When asked to elaborate on her school's culture and resistant colleagues, Ella said:

> The "Boys' Club" members mock the women in the department for going above and beyond, and you know, for the ideas that they have. They laugh at the ideas we have openly. They ruin everything. I think about how if [a non-leader] left, how different everything would be. It's amazing how…a few people have that much influence on the others. And I feel like a lot of negativity stems from just a few people. You know, one teacher versus another, and they could be there the same amount of time or young versus old. It doesn't matter…[The non-leaders] push their advice on me. I don't seek their advice. It starts out as friendly conversation that turns into them telling me what to do – how I shouldn't worry about impressing other teachers or what the bosses have to say. I seriously think they think I am going to listen to them too. They thought I was gonna start talking badly about administration and other good teachers, like they do. That didn't happen, so now they literally laugh at me when I do extra and view me as subordinate.

Ella illustrates another way colleagues might become separated – according to gender. I did not discover any information regarding school culture divided by gender in the literature. Truly, this aspect of Middleton's culture is something I did not expect to uncover. Regardless, no matter how or why particular groups of teachers in a school are alienated, a balkanized (Hargreaves, 1994), territorial, or adversarial (Barth, 2006) culture is a "toxic" one (Deal & Peterson, 1998) that squelches informal teacher leadership.

No matter who antagonizes whom, the informal teacher leaders' reports of relational bullying among colleagues are consistent with researchers' findings (Hart, 1994; Johnson & Donaldson, 2007). In Smallville and Middleton, non-leaders' adversarial behaviors fail to affect the actions of interviewed informal teacher leaders. Although they wish their relationships with non-leaders would be different so as to create a more positive school culture, informal teacher leaders continue to assume additional responsibilities even though non-leaders visibly disapprove. Nevertheless, non-leaders' noticeable condemnation of informal leadership behaviors may, in some instances, hinder a potential informal teacher leader's willingness to lead. Above, James described how an informal teacher leader became extremely reluctant to engage in an extra-role behavior (Organ, 1990) of her choice because of relational bullying by colleagues.

I believe that resistant colleagues hinder the growth of informal teacher leaders more than any other aspect of school culture. I have witnessed several colleagues with the capacity and desire to lead withdraw from informal leadership opportunities because some colleagues might otherwise create too hostile a work environment for them. The interviewed informal teacher leaders contend to have seen this aspect of the phenomenon as well. To prevent resistant colleagues and other elements of school culture from hindering the growth of informal teacher

leadership, the respondents offer advice to their administrators. Below is a report of ways that administrators might promote and sustain informal teacher leadership in their schools.

7.3 TEACHERS' ADVICE FOR ADMINISTRATORS WHO WISH TO PROMOTE AND SUSTAIN INFORMAL TEACHER LEADERSHIP

Interviewed informal teacher leaders offered numerous suggestions when asked, "What can principals do to promote and sustain informal teacher leadership in their schools?" Essentially, respondents provided insight throughout their interviews; however, when asked this question, informal teacher leaders enthusiastically presented their recommendations. According to respondents, if principals wish to promote and sustain informal teacher leadership in their respective schools, they might want to reflect on the following advice.

Joan urges administrators to "accept that some teachers just aren't going to lead." As she explained:

> There's always some "old school" teachers who…just prefer to not be noticed. [A colleague] does that all the time. You know, she says: "When everybody else takes a step forward to volunteer, I take a step back because I don't want to be noticed or call attention to myself because I don't want to get into any trouble." It might be a personality thing…Some people just aren't comfortable being accountable.

According to Joan, some teachers with the capacity to lead basically are not confident enough to lead. Joan's advice to administrators is consistent with George's contention that behavior cannot be forced. Ella advises school administrators to take their acceptance (of some

276

teachers' choosing not to lead) a step farther to understand why certain teachers choose not to lead. Ella provided administrators with her perception of why some teachers refuse to lead:

It's just easier to do your own thing…keep to your own classroom…You don't have to work as hard as you do when you lead. You don't have to reflect or let others reflect upon what you're doing and give you advice. The non-leaders are very insecure in some ways with what they're doing and would rather not put it out there to be judged.

Like Joan, Ella believes that many non-leaders lack confidence. She also suggests that informal teacher leaders are evaluated by supervisors and peers more often than non-leaders who "fly under the radar."

Behaviors cannot be forced; nevertheless, they can be modeled. Perhaps for some prospective informal teacher leaders, witnessing administrators' leadership behaviors might serve as motivation for them to extend themselves beyond the terms of their contractual agreements. As David explained:

It's like the guy who goes in the trenches with you and works alongside of you, you're going to do a whole lot more for them then for someone who is just going to stand here and tell you what to do.

David is inspired by formal leaders who lead informally. Essentially, he values administrators who extend themselves beyond the terms of their contractual agreements. To David, if a school principal undertakes tasks typically reserved for teachers, then he/she illustrates a level of commitment that might arouse teachers' desires to lead as well.

Similarly, Joe invites administrators to model leadership behaviors by "practicing what they preach." Joe argued:

277

You can't say one thing and do another. You can't say, "Well, you should do this," and

then not do it. Um, I've known principals who go for the job and all the faculty

remembers is that this is a teacher that never came out of their room to stand in the

hallways between periods. This was the teacher that during class would have the sports

page open on their desk and now that they become an administrator they are telling you

not to do the same thing.

In addition to explaining the importance of administrators' modeling of professional behavior

Joe alludes to teachers' apparent capacity to allow past practices to influence their current

perceptions of someone's behavior. Chloe presented a more specific example of how a teacher

might "hold a grudge against a principal," and then behave accordingly:

Know that [all teachers think] that they have a cause and that cause needs to be dealt

with. They think, you know, it is the principal's job to step up to the plate and take care

of things and it becomes an insult to some teachers, and they take it very personal if those

issues aren't dealt with…They kind of put that in their memory bank and that memory

bank starts coming out…That's where a lot of negativity comes from.

Many informal teacher leaders believe that administrators might promote informal

teacher leadership if they make teachers feel valued for their outstanding work and extra efforts.

Chloe offered insight regarding the power of an administrator's "Thank you":

For me, it is one hundred percent the feedback I get…I have always been a big person of,

you know, wanting people to accept and understand that I am kind of a person who goes

a little bit further. I get a lot of gratification from hearing someone say, "[Chloe] thank

you." Making a comment here and there or sending an email saying, "You know, I really

enjoyed your lesson," goes a long way…Knowing that my principal recommended me for this study is quite an honor.

When Steve thanks Chloe, she feels fulfilled. Although they welcome an administrator's kind words, other informal teacher leaders prefer that he/she demonstrate appreciation via a behavior instead of verbal praise. Two suggestions as to how administrators might show their gratitude are to: (a) refrain from assuming that informal teacher leaders are going to "do all the work;" and (b) discipline teachers who do not uphold the terms of their contractual agreements. Lydia encourages school principals to "ask nicely, and stop expecting certain teachers to take on everything." Likewise, Joe recommends that his administrators approach teachers so that they "don't feel like they are being taken advantage of." He explains how his supervisor inspires him to lead in this regard:

> When the superintendent asks me to do something, I never feel like I am being taken advantage of. I would do anything for her because she would do anything for all the teachers. She is the epitome of a leader.

Joe feels much like David, who tends to work more diligently for an administrator who models good behavior. However, Joe perceives his administrator's modeling of appropriate behavior as evidence of her thankfulness for teachers' good work. To informal teacher leaders like Joe and David, an administrator's engagement in tasks usually expected of teachers *is* the "Thank you."

Interestingly, every interviewed informal teacher leader either stated directly or implied that administrators might illustrate their appreciation for a teacher's willingness to engage in informal leadership behaviors by penalizing teachers for inappropriate behaviors. George plainly advises principals to "hold teachers accountable and meet any challenge with an enthusiastic response." Joe suggests that administrators "quit worrying about being liked." He noted that his

administrators always "talk to the person" instead of what he would do if given the opportunity – "put a letter in their file." Finally, Anna not only counsels administrators to discipline teachers when necessary, but also acknowledges that addressing teachers' incompetence would be "breaking past practice." Anna explained:

> You know, it might have been "ok" 20 years ago for someone to be a slacker. But, at some point there has to be a consequence for it, and at some point you have to break that cycle. But, I don't think that anybody wants to be the person that has to initiate that. Things have to change.

While the interviewed informal teacher leaders insist that principals need to reprimand ineffective teachers, they simultaneously advise principals to offer non-leaders opportunities for professional development so they embrace change more readily. Gabrielle distinguishes between informal teacher leaders and non-leaders by observing how her colleagues react to organizational changes. Gabrielle argued:

> To [non-leaders], this is just a job, not a career…They just don't have the same sense of achievement within themselves…You always have to have that drive to do better – to try to change things. People who don't want to lead I think don't necessarily enjoy change or like change. People who have leadership qualities are always willing to change. They're always looking to change something to better themselves or better what they do.

Gabrielle infers that informal teacher leaders react more positively to change than non leaders, and if administrators provide non-leaders with training on how to accept and affect change, then eventually, non-leaders may display a willingness to assume extra responsibilities.

Finally, some informal teacher leaders suggest simply, practical changes they believe may significantly promote informal teacher leadership in their schools. For example, Ella

280

noticed that at Middleton, many of the non-leaders are confined to the same corner of the building. Ella said:

> Change some of the rooms around. It should be as easy as this. Being that some of these teachers are in the same hall together, that allows them too much time during the day to spend, you know, in between classes, you know, just kind of being negative. That is so simple but would make a huge difference in the culture.

Immediately following her advice above, Ella suggested that principals "stick around for more than a few years" and "be visible when [you're] here." Ella continued: "There would definitely be some positive effects on the environment if everyone saw the same good principal every day, year after year." During our conversation, Ella's recommendations led me to conclude that Middleton's principals do not stay very long. Upon being asked to clarify her comment, she confirmed my suspicions yet was unable to speculate upon why this is the case. Perhaps the "toxic culture" (Deal & Peterson, 1998) of Middleton presented too big a challenge for previous administrators.

Lastly, Joe and George assert that if teachers feel a connection to the surrounding community or can empathize with community members, then they may feel compelled to undertake informal leadership tasks. To ensure a tie to the community, Joe advocates that school districts hire community members. When offering this advice, Joe proudly stated: "There's blue and gold in my veins. I have a stake in this school, for the school district to survive. It's more than just a job to me." George also suggested how principals might inspire teachers to connect with the community:

> Inform teachers of their students' situations. I think some teachers knowing the backgrounds of these students, knowing where they come from – there is no dad; the

mom's a heroin addict – that kind of motivates them to say, "I want to go to this tonight and support 'so and so' because nobody else will be there for them." I think knowing the background of the students kind of gives them motivation to do extra.

Although the aforementioned teachers choose to lead informally regardless of their principals' actions, their advice for principals may help their supervisors encourage teachers with the capacity to lead to assume extra responsibilities. Both Steve and James believe that informal teacher leadership improves students' achievement; thus, they may wish to consider their informal leaders' recommendations to move their middle schools forward.

7.4   A SUMMARY OF CONDITIONS THAT EITHER PROMOTE OR HINDER INFORMAL TEACHER LEADERSHIP

In Smallville and Middleton, the same factors seem to promote and hinder informal teacher leadership: administrators' behaviors and school culture as created by teachers. Additionally, "time" appears to be a barrier to informal teacher leadership because in both middle schools, non-leaders claim that a lack of time prevents them from assuming extra responsibilities.

The interviewed informal teacher leaders overwhelmingly agree that although their school principals' behaviors occasionally may stifle informal teacher leadership – specifically the growth of potential informal teacher leaders – their bosses demonstrate far more behaviors that inspire informal teacher leadership. Irrespective of their principals' behaviors, the informal teacher leaders continue to extend themselves beyond the terms of their contractual agreements. Additionally, the interviewed informal teacher leaders voluntarily demonstrate organizational citizenship behaviors (Organ, 1990) like loyalty to their schools, "civic virtue," and a desire to

develop professionally (Podsakoff et al., 2000) despite the relational bullying that occurs between non-leaders and them. Nevertheless, they remain concerned that strained relationships among colleagues might dissuade budding informal teacher leaders from "stepping up" (personal communication, 2009). For this reason, they offer their advice to administrators as to how they might promote and sustain informal teacher leadership in their schools.

8.0   DISCUSSION, IMPLICATIONS, AND CONSIDERATIONS FOR FUTURE RESEARCH

Two kinds of teacher leaders exist in schools: (a) formal leaders who receive compensation for the extra-role responsibilities (Organ, 199) they assume; and (b) informal leaders who voluntarily assume additional responsibilities and demonstrate organizational citizenship behaviors (Organ, 1990; Podsakoff et al., 2000) for no compensation. This study examined the phenomenon of informal teacher leadership as it manifests in two suburban middle schools located in Western Pennsylvania.

The purpose of this study is twofold. First, as an informal teacher leader, I aspired to uncover fellow informal teacher leaders' motivation for voluntarily engaging in behaviors beyond those mandated by the terms of their contractual agreements. In essence, I intended to learn why other informal leaders in middle schools willingly seek and assume additional responsibilities (for no compensation in the form of time or money) especially if they encounter obstacles to leadership as I do. Next, based upon the data gleaned from interviews with informal teacher leaders particularly, I wanted to offer suggestions to school administrators – namely principals – about how they might promote and sustain informal teacher leadership in their respective schools. Fundamentally, I hope my findings inspire the type of informal teacher leadership that, according to literature, truly reforms schools (Gronn, 2000; Muijs & Harris, 2007; Pounder, 2006; Snell & Swanson, 2000).

This chapter summarizes my major findings and communicates unexpected discoveries. Woven throughout the discussion are suggestions for professional practice. The chapter also addresses implications for scholarship by referring to the assemblage of literature and considering what future research might be conducted to gain a more thorough understanding of informal teacher leadership. Finally, Chapter 8 explains how the results of this study have caused me to change my perspective on informal teacher leadership.

8.1   SUMMARY OF MAJOR FINDINGS AND SUGGESTIONS FOR PROFESSIONAL PRACTICE

This section summarizes my major findings, presents unexpected discoveries about informal teacher leadership at Smallville and Middleton, and offers suggestions for professional practice. Because "informal teacher leadership" was the phenomenon under study, the findings reported in this section stem mainly from the analysis of data gleaned from interviews with informal teacher leaders. Although I interviewed both school principals and non-leaders to develop a more comprehensive understanding of how the phenomenon manifests at Smallville and Middleton, the information addressed in this section is not separated according to group. Instead, the report is a synthesis. In the following text, I impart my overarching conceptions of informal teacher leadership as a phenomenon and present suggestions to school administrators who might wish to promote and sustain informal teacher leadership in their respective schools.

8.1.1   Informal Teacher Leadership Manifests Differently According to Context

After reviewing the literature, I learned that informal teacher leadership is abstract and cannot be defined universally because it is a situational construct (Lambert, 2003). Seemingly, "informal teacher leadership" means something unique to every informal teacher leader. Expectedly, some commonalities exist; the interviewed informal teacher leaders exhibit common behaviors linked to their work as educators, and similar characteristics associated with their self- motivation. Additionally, their personal experiences surely shape the phenomenon. However, the meaning behind the informal leadership behaviors they exhibit is intensely personal and specific to the settings in which they work.

Nevertheless, for the purpose of this study – to suggest to administrators ways they might promote and sustain informal teacher leadership in their schools – I needed to concentrate a bit more on commonalities than disparities. As a result of the research, some common behaviors of the informal teacher leaders of Smallville and Middleton surfaced. These common behaviors can be framed in terms of Podsakoff et al.'s (2000) seven categories of extra-role behaviors (Organ, 1990) and Oplatka's (2006) four domains of organizational citizenship behaviors. Another overarching commonality is the way the informal teacher leaders perceive "bare minimum practices," or the behaviors that according to them, every classroom teacher – leader or not – *should* exhibit. This information is discussed below.

8.1.1.1 Common Organizational Citizenship Behaviors among Informal Teacher Leaders

As anticipated, all informal teacher leaders engage in one or more of the following extra-role behaviors (Organ, 1990) that directly relate to their interactions with students and elucidate the common aspects of their work: (a) arriving to work earlier and staying later than expected; (b)

attending events after school like football or basketball games, dances, or recitals for the purpose of interacting with parents or supporting students outside the classroom; (c) giving students food or clothing if their basic needs are not being bet at home; (d) tutoring students during his or her preparation period; (e) sponsoring clubs and activities; (f) remaining available for students should they wish to discuss an issue that might not be related to their academics; (g) accompanying students on field trips that are not mandated by the District; (h) displaying students' work in the hallways; and (i) contacting parents before or after contracted hours. All the aforementioned informal leadership behaviors can be framed according to Podsakoff et al.'s (2000) "individual initiative" dimension of organizational citizenship behavior. "Individual initiative" refers to an employee's voluntary engagement in behaviors beyond those expected. Since none of these informal leadership behaviors are mandated by the terms of the teachers' contractual agreements, they can be considered examples of "individual initiative" – a specific organizational citizenship behavior (Organ, 1990).

In addition to demonstrating "individual initiative," the interviewed informal teacher leaders also engage in behaviors that can be aligned with Podsakoff et al.'s (2000) six other dimensions of organizational citizenship behaviors (Organ, 1990). Podsakoff et al. (2000) did not consider the specific behaviors of informal teacher leaders when organizing their seven dimensions. Instead, they used the dimensions to frame the behaviors of any individuals who choose to engage in extra-role behaviors (Organ, 1990) that are not mandated by their respective organizations. Nevertheless, I believe that my findings illustrate organizational citizenship behaviors as applicable to informal teacher leadership within each dimension. The following table summarizes this information.

Table 27 Informal Leadership Behaviors Categorized According to Podsakoff et al.'s Dimensions of OCBs

Podsakoff et al.'s Category of OCBs	Explanation of Each Category of OCB	Corresponding Informal Leadership Behavior(s)	Specific Example(s) from Research
Helping Behavior	Voluntarily helping others with or preventing the occurrence of work-related problems	Assisting colleagues with professional development Serving as a liaison between teachers and administrators for the purpose of maintaining peaceful relations Mentoring	Ella assists her colleagues in writing assessments that align with her school district's professional development initiatives. Joan speaks to her school principal on behalf of her colleagues to prevent arguments; she also encourages her colleagues to communicate regularly with their principal. Joe often voluntarily mentors student teachers who had struggled at their previous placements
Sportsmanship	Demonstrating a willingness to tolerate the inevitable inconveniences and impositions of work without complaining	Agreeing to accept a responsibility that no one else appears willing to accept	David agreed to tutor students outside his subject area "because James couldn't find anyone else to do it." As the school district's only art teacher, Lydia teaches every grade level and prepares for seven different classes daily.

Table 27 (Continued)

Podsakoff et al.'s Category of OCBs	Explanation of Each Category of OCB	Corresponding Informal Leadership Behavior(s)	Specific Example(s) from Research
Organizational Loyalty	Spreading goodwill, protecting the organization, and endorsing, supporting, and defending organizational objectives	Interpreting administrators' agendas Communicating positively about the school or the surrounding community	As liaison between teachers and administrators, Joan often supports and even defends her administrators' professional agendas. A life-long member of the community, Joe speaks positively about both the school and surrounding community, and considers ways to reach out to community members.
Compliance	Internalizing or accepting rules, procedures, and policies, resulting in complete adherence to them even when no one is observing	Modeling appropriate behavior	To show her students how she prefers they behave, Chloe models life-long learning and leadership behaviors at all times, even when her principal is not observing her classroom.
Civic Virtue	Remaining interested in the organization as a whole – at the macro-level	Writing a grant to fund a school-wide initiative Diagnosing organizational needs	Anna wrote a grant to fund the purchase of exercise equipment, and completely revamped the physical education curriculum. Joe lobbied for a finance course to teach his students – and consequently, their parents – to manage their assets because he recognized a community-wide need for finance education.

Table 27 (Continued)

Podsakoff et al.'s Category of OCBs	Explanation of Each Category of OCB	Corresponding Informal Leadership Behavior(s)	Specific Examples from Research
Self-Development	Taking advantage of opportunities to grow professionally	Continuing education or professional development that is not mandated	Lydia enrolled in leadership classes. George earned his principal's certificate; since this study has been conducted, he moved from working as one of Smallville's teachers to its assistant principal. Anna learned how to write a grant.

Throughout interviews, informal teacher leaders spoke freely about their positive attitudes toward leadership and their school organizations as a whole. When considered together, the behaviors they demonstrate are indicative of their positive attitudes and ability to view their schools holistically so they see beyond their respective classrooms and think in terms of the "greater good" – an organizational citizenship behavior known as "civic virtue." They remain loyal to their schools, administrators, colleagues, and students notwithstanding the obstacles they encounter. Their loyalty is evidenced by their approach to leadership, which includes guiding students and colleagues to exercise ethical practices and strive to achieve their best by modeling examples of the desired behaviors. The informal teacher leaders do not wield power to affect change, for they do not perceive themselves as authority figures. Instead, they prefer to influence students and colleagues by modeling desired behavior and seeking

professional development opportunities – by engaging in organizational citizenship behaviors (Organ, 1990; Podsakoff et al., 2000).

Oplatka (2006) was among the first to apply Podsakoff et al.'s (2000) seven dimensions of organizational citizenship behaviors specifically to teachers' behaviors. Oplatka (2006) organized four domains of teacher leadership depending upon to whom a teacher's leadership behavior is directed (This information is discussed in detail in Section 2.7.1). The interviewed informal teacher leaders' behaviors also can be categorized according to Oplatka's four domains. Table 28 illustrates the connection between Oplatka's findings and my research.

Table 28 Informal Leadership Behaviors Categorized According to Oplatka's Domains of OCBs

Oplatka's Domain of OCB	To Whom the OCB is Directed	Characteristics of OCB in Each Domain	Specific Example(s) from Research
1	Individual	Assists students outside of class Shows compassion for less fortunate students Attends to changes in students' behaviors or emotions	Joe often devotes his preparation period to tutoring students. Most of Smallville's educators help to meet students physical needs; some willingly give students food or clothing. Ella remains available before and after school just in case her students want to talk about a problem.
2	Whole Class	Aligns instructions to students' needs Prepares instructional materials Assigns and assesses more work than is necessary	Both Chloe and Ella differentiate their instruction to meet students' specific learning needs. Lydia voluntarily assigned to her students the task of making jewelry to sell so they could learn how to design, produce, and market a product.
3	Colleagues	Shares materials Offers professional assistance Assists with administrative tasks Attends to colleagues' emotional needs	Ella willingly shares with her colleagues the assessments she creates. She also offers assistance by permitting colleagues to observe her classroom so they can learn from her example. Finally, Ella considers her colleagues' emotional needs, and frequently speaks with teachers who are "in a rut" to try to help them gain a more positive perspective on their practices.

Table 28 (Continued)

Oplatka's Domain of OCB	To Whom the OCB is Directed	Characteristics of OCB in Each Domain	Specific Example(s) from Research
4	School Organization	Participates in committees Sponsors extracurricular activities and events Undertakes unrewarded roles	David sponsors some extracurricular activities for which he does not receive a stipend.

Like Oplatka (2006), I discovered that informal teacher leaders' behaviors can be directed toward individual students, entire classes of students, colleagues, or the school. Most of the interviewed informal teacher leaders' extra-role behaviors (Organ, 1990) are directed toward individual students. However, as summarized above, they do engage in some informal leadership behaviors that are characteristic of Oplatka's other three domains. Furthermore, I learned that informal teacher leaders' behaviors also can be directed toward themselves or their communities. This unexpected discovery is discussed in Section 8.1.5.

The informal teacher leaders deem the aforementioned organizational citizenship behaviors (Oplatka, 2006; Organ, 1990; Podsakoff et al., 2000) "bare minimum practices" and uphold that at the very least, every classroom teacher should lead informally to improve students' achievement. I address this common finding in the following section.

8.1.1.2 Common Perceptions of "Bare Minimum Teaching Practices"

For the interviewed informal teacher leaders, leading informally may not always be a conscious choice; many failed to recognize their behaviors as extra-role. Unlike the non-leaders, who during interviews often referred to the terms of their contractual agreements with their school

districts and reported that they behave accordingly, some informal teacher leaders claimed that they do not use their teaching contract as a tool to determine the extent of their work. Instead, the informal teacher leaders impressed upon me that they behave in accordance with their perceptions of good teaching, and beliefs about what is best for students and their schools, irrespective of mandated behaviors. By using their recognition of students' and organizational needs in lieu of their contractual agreements to guide their work, the informal teacher leaders inevitably exceed contractual expectations.

Learning that the informal teacher leaders' behaviors are inspired by their notions of "good teaching" leads me to question the connection between informal teacher leadership and teaching. Essentially, I wonder if informal teacher leadership is simply "good teaching" in the views of those who chose to lead. As reported in Chapter 5, informal teacher leaders struggle to distinguish between their organizational citizenship behaviors (Oplatka, 2006; Organ, 1990; Podsakoff et al., 2000) and "bare minimum teaching practices." Perhaps taking a closer look at teaching practices, in general, might help me to frame informal teacher leadership. Later in this chapter, this notion is explored more thoroughly as an implication for scholarship.

8.1.1.3 A Summary of Informal Teacher Leadership in Context

Regardless of the above commonalities I discovered among the informal teacher leaders of Smallville and Middleton, I must make one point extremely clear: the phenomenon is unique to each informal teacher leader and every environment in which it manifests. For example, Ella might assist her colleagues by permitting them to observe her teaching or helping them design appropriate assessments in accordance with the District's professional development initiatives, but Joan might help her colleagues by "being a buffer" between them and administrators during heated conversations. Whereas Chloe might lead by modeling an outstanding work ethic for her

students, Joe might lead by arranging for his students to educate their parents about money management. No matter how they lead informally, the environments in which they work most definitely influence informal teacher leaders' behaviors.

At Smallville, for example, informal teacher leaders unite to meet their students' basic needs. Because they believe their students' physical or emotional needs are not met at home, they rally to provide and care for students. However, the informal teacher leaders' displays of empathy are specific to each leader. Whereas one might spend her weekends collecting coats for children to wear in winter, another might sacrifice his preparation period daily to counsel students and give them a safe environment in which to inquire and speak without reservation.

Informal teacher leadership manifests differently at Middleton, and informal teacher leaders of Middleton demonstrate various behaviors. Because the culture of Middleton is balkanized (Hargreaves, 1994), a severe distinction exists between informal teacher leaders and non-leaders. Thus, informal teacher leadership at Middleton often involves keeping peace among staff members. Surely, Middleton's informal teacher leaders extend themselves to improve student achievement; some tutor students after school or provide students with opportunities for enrichment or remediation. But, whenever possible, others work industriously to prevent arguments between colleagues from occurring. This is a form of informal teacher leadership that does not appear to exist at Smallville.

As unique to informal teacher leaders as their actions and inspirations for leading are their paths to leadership. My findings regarding why and how the respondents grew to lead informally are summarized in the next section.

295

8.1.2   Informal Teacher Leaders are Self-motivated to Exceed Expectations

Although some informal teacher leaders described extrinsic motivators when asked what compels them to exceed expectations, all interviewed informal teacher leaders agree that self-motivation drives their leadership behaviors more so than any other factor. Some remember leading from a very early age and claim to have been "born leaders." Some recall being influenced to lead because their parent(s) or former teacher(s) recognized their capacity to lead and instilled in them a desire to guide others that now manifests as self-motivation. No matter why or how they came to lead, all expressed an innate desire to assume extra responsibilities – not always to better themselves or further their own agendas, but to strengthen their schools and communities. Despite the obstacles to informal leadership they encounter, these teachers' self-motivation is powerful enough to overshadow any negative feelings about leading that might creep into their minds. They persevere because they truly want to move their school districts forward.

In regard to reasons why the informal teacher leaders engage in extra-role behaviors (Organ, 1990) and demonstrate organizational citizenship behaviors (Oplatka, 2006; Organ, 1990; Podsakoff et al., 2000), self-motivation seems is cited more often than external rewards in most instances. Based upon their responses to interview questions, the positive experiences of which they spoke, and their interest in this study, I believe the interviewed informal teacher leaders will demonstrate some extra-role behaviors regardless of extrinsic motivators. Nevertheless, informal teacher leaders spoke of the most prevalent motivators present at Smallville and Middleton. This information is discussed below.

8.1.3 Additional Motivators for Informal Leadership Behaviors

School administrators cannot meet the high demands of public education without relying upon teachers to assist them (Danielson, 2007; Elmore, 2000). Thus, they need to distribute leadership responsibilities to teachers who volunteer to do extra (Elmore, 2000; Spillane et al., 2001). According to Harris (2005), teacher leadership is the key to school improvement.   Although formal teacher leaders will assume extra responsibilities if compensated for their efforts, the informal teacher leaders who are self-motivated to work diligently seem especially critical for school reform because they are driven by factors other than money.

As explained in Section 8.1.2, the interviewed informal teacher leaders claim that self-motivation prompts their behaviors. However, these same informal teacher leaders admit to factors aside from self-motivation that inspire them to do extra. Hence, administrators may want to promote and sustain informal teacher leadership in their respective schools by recognizing the following factors that encourage the phenomenon.

First, some informal teacher leaders assert that they enjoy pleasing others and therefore respond positively to a school administrator's favorable reactions to their work.   Their recognition that an administrator's behaviors can promote informal teacher leadership is consistent with the literature (Danielson, 2007; Slater, 2008). For example, many informal teacher leaders mentioned that they find a principal's "thank you" rather rewarding. Although some specifically stated that a "thank you" does not necessarily provoke their informal leadership behaviors, they mentioned that they are appreciative when their school principals acknowledge their efforts. Perhaps other teachers who are motivated by verbal praise might be stirred to assume additional responsibilities if recognized either privately or publically for their efforts.

297

The informal teacher leaders also noted that they sincerely appreciate and respond more positively to a principal who models extra-role behaviors (Organ, 1990) and organizational citizenship behaviors (Oplatka, 2006; Organ, 1990; Podsakoff et al., 2000). If an administrator remains willing to assume duties typically reserved for teachers, then potential informal leaders might be more inclined to work harder. Simply, teachers might be moved to give their best for a principal who gives his or her best.

Administrators also might promote informal teacher leadership if they develop a good rapport with their teachers. The interviewed informal teacher leaders admit that it is quite difficult for them to say "no" to an administrator whom they like and respect. If a school principal visits their classrooms, notices their contributions to their schools, or engages them in personal – yet appropriate – discussions, then promising informal teacher leaders may be more likely to work diligently for him or her.

Next, the informal teacher leaders (of Smallville, particularly) deem their students' needs another factor that motivates them and many of their colleagues to exceed contractual expectations. Some recalled incidences when non-leaders demonstrated glimpses of informal leadership behaviors because even they were inspired by their students' physical or emotional needs. Respondents asserted that budding informal teacher leaders might be more inclined to lead if they were made privy to information about their students' specific physical, emotional, behavioral, or academic needs.

The interviewed informal teacher leaders recognize the possible positive effects of the above supports, which at times have inspired their leadership behaviors. Conversely, they also understand how certain conditions within schools might prevent teachers from leading informally. Potential barriers to informal teacher leadership are detailed in the next section.

298

8.1.4   Barriers to Informal Teacher Leadership

Among the barriers to informal teacher leadership outlined in Chapter 2, the informal teacher leaders believe resistant colleagues are, by far, the largest obstacles to overcome. All but one informal teacher leader reported being the target of relational bullying from colleagues who appear to devalue informal leadership behaviors. Comments like, "Oh, I see you're doing *that* again," or "I see you won *another* award," are, unfortunately, commonplace. The informal teacher leaders reported being questioned about their motivation to exceed contractual expectations, and have been told to stop exerting themselves because they "make [non-leaders] look bad." They have been accused of being incompetent because they "are unable to finish their work during the school day," and have been judged as "administrative lackey[s]." Where a clear division between teachers and administrators exists, non-leaders have accused informal teacher leaders of assuming extra responsibilities to further their personal agendas – namely, to align themselves with administrators for professional advancement.

The interviewed informal teacher leaders carry on regardless of some non-leaders' accusations, downbeat comments, or frequent displays of animosity (usually in the form of "rude looks"). Apparently, their self-motivation and feelings of (moral) obligation to lead, desire to please others, and administrators' positive reactions to their work overshadow their fears of being targeted by disapproving colleagues. However, Principal James and most informal teacher leaders have witnessed potential leaders crumble when confronted by unsupportive, judgmental colleagues. One might argue that any teacher who succumbs to relational bullying does not have the fortitude to lead in the first place. But, if the informal teacher leaders' reports hold true, then some non-leaders' negative reactions to informal leadership behaviors might be too large a barrier for certain teachers to break. If a teacher demonstrates the ability to lead, yet fails to

exercise confidence to stand among the disapproving, then he or she might be significantly affected by non-leaders' pessimism.

In addition to resistant colleagues as a hindrance to informal teacher leadership, an administrator who allows his or her school's culture to remain "toxic" (Deal & Peterson, 1998) also serves as a barrier to the phenomenon. All interviewed informal teacher leaders suggest that their school principals' actions largely promote informal teacher leadership in lieu of hinder it. Even so, they wish that whenever possible their principals squelch negativity and unconstructiveness, and instead, celebrate informal leadership behaviors.

When asked to recommend how their principals might communicate the message that informal leadership behaviors are valued far more than some non-leaders' unproductive behaviors, most informal teacher leaders urge their principals to discipline teachers who fail to adhere to the terms of their contractual agreements. Apparently, the interviewed informal teacher leaders perceive the relational bullies as ineffective. Essentially, the informal leaders believe that if a school principal punishes non-leaders who "do not do their job," then they may be less inclined to bully the teachers who wish to assume additional responsibilities. Additionally, if the school principals value informal teacher leaders as they claim, then they may feel accountable for ensuring their informal teacher leaders are free to work in a collegial environment.

In addition to the above findings, I uncovered some aspects of informal teacher leadership that I did not expect to discover. The following section of this chapter addresses these unexpected discoveries.

8.1.5　Unexpected Discoveries

Upon beginning this study, I assumed that I would learn similar information to that reported in Sections 8.1.1 through 8.1.4. Most of my presuppositions held true. Indeed, I discovered how informal teacher leadership manifests at Smallville and Middleton, and the conditions that either promote or hinder informal leadership behaviors. However, I also learned unexpectedly that: (a) students' physical and emotional needs can inspire informal leadership behaviors; (b) informal teacher leaders demonstrate organizational citizenship behaviors outside of Oplatka's (2006) four domains; and (c) informal teacher leaders' frame their responses to questions differently than non-leaders. This information is reported in the following three sections.

8.1.5.1 Students' Physical and Emotional Needs can Inspire Informal Leadership Behaviors

Upon beginning the study, I assumed that Smallville would yield more informal teacher leaders than Middleton, and that Middleton would invite informal leadership behaviors more readily than Bigland – the school district in which I work. Generally, I remained convinced that larger middle schools – with more physical distance between colleagues so as to limit their interactions, and perhaps more money to pay teachers to assume formal leadership responsibilities – present far more hindrances to the growth of informal teacher leaders than smaller schools. My assumption stemmed from the fact that I work in a large middle school (Bigland enrolls approximately 1,000 students) and over the years have encountered numerous barriers to informal teacher leadership.

Furthermore, my notion regarding school size as an influence on informal teacher leadership proved true, but not for the reasons I expected. As established in Chapter 3, I believed that smaller school settings are more conductive to informal teacher leadership because such

environments promote an intimacy among administrators, teachers, and students that incites informal leadership behaviors. Basically, when I imagined a small school setting, I envisioned teachers and administrators collaborating as close-knit family members for the purpose of meeting students' needs.

Certainly, Smallville's culture is the most collegial of the three school environments studied. As reported by respondents, most of Smallville's teachers assist colleagues, assume extra responsibilities, and exceed contractual expectations. However, whereas most educators who work in schools with collegial cultures might engage in the aforementioned behaviors to improve students' academic performances, Smallville's teachers demonstrate informal leadership behaviors for the apparent purpose of helping students meet their physical and emotional needs. According to Smallville's educators, the overwhelming majority of most students' basic needs are not met at home. Hence, many informal leadership behaviors are exhibited to ensure students' physical and emotional safety. Therefore, the needs of the surrounding community seem to drive Smallville's teachers to rally and lead informally more so than its size.

At Smallville, this aspect of the phenomenon is most evident when considering non-leaders' reactions to informal leadership behaviors. If Smallville's small size directly promoted informal teacher leadership by creating a closeness among staff who interact regularly, then its non-leaders might feel more inclined to contribute to the organization. Yet, the non-leaders' behaviors do not appear to be driven by Smallville's size. They neither feel compelled to lead informally nor support informal teacher leaders who wish to demonstrate organizational citizenship behaviors (Oplatka, 2006; Organ, 1990; Podsakoff et al., 2000). Instead, they collectively support one type of informal leadership behavior – the assumption of extra-role responsibilities (Organ, 1990) undertaken for the purpose of meeting students' basic needs.

Hence, the needs of the surrounding community appear to inspire informal teacher leadership most directly at Smallville.

8.1.5.2 Informal Teacher Leaders Demonstrate Organizational Citizenship Behaviors Outside of Oplatka's (2006) Four Domains

Next, I unexpectedly discovered that some of respondents' informal leadership behaviors fall outside of Oplatka's (2006) four domains of organizational citizenship behaviors. For example, most informal teacher leaders who claim that self-motivation inspires the majority of their organizational citizenship behaviors also insist that they feel a sense of personal satisfaction whenever they assume additional responsibilities. Lydia and Joe reported that they thoroughly enjoy attending graduate education courses simply because they love to learn. Chloe and David, who regard themselves as "life-long learners," also expressed a desire to engage in professional development opportunities for the sake of developing personally. Essentially, organizational citizenship behaviors like voluntarily enrolling in leadership courses or willingly engaging in professional development opportunities may be categorized as "personal" if the behaviors bring about a sense of personal satisfaction. Perhaps "personal" may be another domain of organizational citizenship behavior since some of the interviewed informal teacher leaders' behaviors are directed toward themselves.

Another domain of organizational citizenship behaviors (Oplatka, 2006) may be "community." Oplatka found that teacher leaders in Israel demonstrate organizational citizenship behaviors that are directed toward the whole school, but she did not report that these teachers' behaviors are directed beyond the school – to the surrounding community. Conversely, I learned that some of Smallville's informal teacher leaders engage in behaviors that affect the community at large. For example, Joe lobbied for a finance course and upon receiving approval,

designed and promoted this course because he hopes to "break the cycle of low income in [his] community." According to Joe, if he models for his students how to take pride in their work, teaches them the value of a dollar, and helps them understand how to manage their money, then his students may, in turn, instruct their parents to do the same. Joe mentioned that he continually disseminates information and resources to his students and instructs them to "take them home and help their parents learn how to be smart about money." Joe contends that he strives to meet the needs of the surrounding community through his students' education. Thus, I believe that "community" is another domain of organizational citizenship behavior.

8.1.5.3 Informal Teacher Leaders Frame Their Responses to Questions Differently than Non-Leaders

I also learned of a few noteworthy differences between the informal teacher leaders and non-leaders based upon how they behaved before, during, and after interviews. First, the informal teacher leaders appeared far more willing to partake in this study than non-leaders. Their agreement to interview was immediate; many contacted me the same day their school principals recommended them for the study. Prior to our first meetings, they asked no questions regarding potential risks or benefits. Any questions the interviewed informal teacher leaders asked were directly related to the subject of the research; they displayed a sincere interest in learning more about teacher leadership.

All informal teacher leaders offered to meet me after school hours, anywhere I deemed appropriate and for as long as I required their assistance. Overall, my official interviews with informal teacher leaders lasted an average of 30 minutes longer than those with non-leaders. During interviews, the informal teacher leaders spoke in terms of "we" and "our students." Upon reviewing transcriptions, I immediately noticed that unless I asked a direct question about

the informal teacher leaders themselves, they framed their responses in terms of "our kids." The majority of their answers to my questions about leadership, "bare minimum practices," and their schools included information about how they interact with students.

Finally, in most instances, the informal teacher leaders and I spent 30 to 60 minutes after formal interviews engaging in professional dialogue. Our conversations were light-hearted and effortless, and generally involved an exchange of advice regarding the employment of differentiated instructional strategies and ways to deal with non-leaders who interfere with our work. This differed from my interactions with non-leaders, who were eager to depart at the conclusion of our much shorter interviews.

Even though the school principals invited the same number of non-leaders as informal teacher leaders to contribute, many more informal leaders contacted me and agreed to participate. Only one non-leader contacted me initially, but he agreed to assist me only "if I [couldn't] find anyone else." Moreover, other non-leaders only agreed to an interview because their school principal arranged for our exchanges to take place on site during contracted hours. On average, my interviews with the non-leaders lasted approximately 35 minutes.

The way the interviewed non-leaders framed their responses to my questions differed greatly from the responses of the informal teacher leaders, who spoke in terms of "we" and "our." In many instances, when I asked the non-leaders a direct question about their students or schools, they answered it by referring to themselves.

To me, these discoveries illustrate differences between informal teacher leaders and non-leaders' perceptions of themselves and work as educators. Whereas the interviewed non-leaders often spoke only of themselves and their respective issues, the informal teacher leaders were able to view themselves as only one part of a large organization. Although they acknowledged

themselves as integral, the informal teacher leaders recognized that their schools were greater than they. Their recognition is demonstrated by organizational citizenship behaviors (Organ, 1990; Podsakoff et al., 2000), for the informal teacher leaders view their schools holistically and act accordingly. To them, even an interview with a researcher ultimately might serve to better their school organizations; thus, they willingly extended themselves beyond contractual expectations, and even mine (Section 8.3 reviews my expectations and discusses how my understanding of informal teacher leadership has changed as a result of this study).

Using the assemblage of literature reviewed in Chapter 2 as well as my findings, I am able to offer suggestions for further research. The following text briefly describes the future research I wish to conduct as well as general research I believe will add to the existing literature.

8.2   IMPLICATIONS FOR SCHOLARSHIP

The findings I reported in Section 8.1 have led me to consider implications for scholarship. As a result of this study, I have an improved understanding of informal teacher leadership and therefore wish to continue examining the phenomenon with different lenses. If informal teacher leaders are critical for lasting school reform (Harris, 2005) and American public schools are entering a fourth wave of school reform (Pounder, 2006), then, as education changes, additional research needs to be conducted in order to promote and sustain the phenomenon. My plans for further research are discussed below.

8.2.1 Helping Informal Teacher Leaders Explore Their Roles, and Providing Support for Teachers Who Wish to Lead Informally

As a result of this study, I find myself considering ways to help informal teacher leaders explore their roles. Because informal teacher leaders' work is unique and personal, their roles remain largely undefined (During interviews, respondents often struggled to explain exactly how they lead informally. They also remained unsure about their roles and how their behaviors affect their schools). Helping current informal teacher leaders to explore and define their roles more concretely might inspire leadership behaviors among other teachers who wish to lead (Pounder, 2006). Since teacher leadership is critical for lasting school reform (Hambright, 2005), school administrators also may want to assist informal teacher leaders with an exploration of their roles, and provide support for teachers who wish to lead informally.

One way that administrators might assist teachers in exploring informal leadership roles is by taking the focus off "leadership" and engaging faculty members in conversations about teaching in general. For some resistant teachers, "leadership" seems to be a point of contention; the subject might make them uncomfortable. If administrators ask questions about teaching – a subject to which all educators can relate and may find less controversial – then dialogue among teachers may open enough to foster a sense of collegiality necessary for more difficult discussions to ensue.

Another reason why administrators might wish to prompt discussions about teaching in general is because the interviewed principals and informal teacher leaders seem to frame informal teacher leadership as "good teaching." During conversations, administrators ultimately can determine if their teachers also perceive a connection between informal teacher leadership and good teaching. If administrators find that their teachers do regard informal teacher

leadership as good teaching, or as an extension of good teaching, then they may be able to define informal teacher leadership in a more tangible way that applies to their respective school contexts and is supported by consensus. This may help current or prospective informal teacher leaders recognize desired behaviors that will also be supported by their colleagues.

Support matters. Informal teacher leaders must feel supported by their administrators and colleagues because their self-motivation is not always enough to promote and sustain the phenomenon. Administrators need to provide support especially for those teachers who want to assume additional responsibilities but are hesitant because they either perceive or have encountered obstacles to leadership.

Aside from promoting and supporting informal teacher leadership by initiating professional dialogue among teachers, administrators might attempt to link teachers' behaviors in their classrooms with specific informal leadership behaviors. Assuming teachers regard informal teacher leadership as "good teaching," some non-leaders may become more interested in leading informally if they knew how to transfer strong teaching skills to informal leadership situations.

Pounder (2006) suggests studying teachers' transformational qualities in their respective classrooms because learning how teachers interact with students may foreshadow their competency as informal leaders, and determine the informal leadership behaviors they presumably may exhibit. If researchers can link teaching styles with leadership behaviors, then school administrators who continually observe teachers may be able to identify potential informal teacher leaders more readily. Therefore, as an extension of this research, I wish to investigate informal teacher leaders' interactions with students and behaviors in their classrooms to conceptualize a connection between their particular performances in the classroom and their informal leadership behaviors. If I am able to associate specific classroom practices with precise

informal leadership behaviors, then I may be able to aid school administrators in identifying teachers with a propensity to lead and the most appropriate type of support to give them.

8.2.2 Combating Relational Bullying Among Teachers

I believe that if informal teacher leaders' roles become less ambiguous – especially as a result of further research and efforts to help informal teacher leaders explore their roles – then school administrators can promote informal teacher leadership. However, a more concrete understanding of their roles might not be enough for teachers to combat one of the largest obstacles to informal leadership: relational bullying among colleagues.

As confirmed by Johnson and Donaldson (2007), and Muijs and Harris (2007), colleagues are not always dedicated to one another's professional growth or assumption of leadership responsibilities. Colleagues often fail to understand teacher leaders' abstract, undefined roles (Smylie & Denny, 1990) or to honor their efforts to deprivatize teaching practices (Barth, 2001). Generally, teacher leaders' colleagues often impede their progress (Ackerman & MacKenzie, 2006; Johnson & Donaldson, 2007; Muijs & Harris, 2007) either actively or passively (Barth, 2001). As detailed in Chapters 4 and 7, both school principals and informal teacher leaders describe numerous incidences of resistant colleagues impeding leadership behaviors. Also, as reported in Chapters 1 and 3, resistant colleagues have presented the biggest challenge to my work as an informal leader.

Perhaps this is why I find the subject of relational bullying among colleagues so fascinating. Undoubtedly, the phenomenon exists. Researchers have discovered it; I uncovered it at Smallville and Middleton; and, I have experienced it. However, all research about relational bullying between informal teacher leaders and non-leaders has been conducted from the

perspective of school leaders. School principals either describe incidences of relational bullying among colleagues they observe, or speculate as to why the phenomenon occurs. Informal teacher leaders discuss their experiences and how unsupportive colleagues affect them personally. To my knowledge, no research on relational bullying among teaching colleagues has ever been conducted from the perspective of the bullies themselves.

I recognize that a study of bullying in the workplace from the perspective of bullies would be termed "high-risk." However, after having engaged in research at Smallville and Middleton, I realize that a few non-leaders remain willing to discuss their negative attitudes and unsavory behaviors directed toward informal teacher leaders without hesitation or reservation. Hence, if I search diligently enough, then I believe I will find non-leaders eager to converse openly about this issue.

If I can learn about resistant colleagues as a barrier to informal teacher leadership by studying teachers who obviously oppose the informal teacher leaders' work, then I might be able to uncover why they find informal leadership behaviors so bothersome. Maybe then I will be able to present findings that will encourage and assist educators to improve schools with adversarial cultures.

No matter the future research upon which I embark, I will continue growing professionally and personally. As a result of this study, I have been inspired to reflect upon my own practice as an educator and how it has changed. The next section of this chapter explains how this study of informal teacher leadership has affected me.

8.3   MY ALTERED PERSPECTIVES AS A RESULT OF THIS STUDY

At the time I framed this study, I maintained a shallow perspective on informal teacher leadership. My understanding of the phenomenon stemmed from having worked for over a decade as an informal teacher leader of Bigland, and being the target of some colleagues' relational bullying. Admittedly, I embarked upon this study with a few biases and assumptions that more than likely originated from my lowered morale. Essentially, particular colleagues' frequent displays of animosity toward me for doing more than which is mandated prompted me to question my own behaviors. Yet, although I had no proof, I truly believed that my extra efforts increased my students' achievement. Moreover, I had no way of knowing for certain that my students were far happier and more engaged than others whose teachers never took work home, never cheered for them on the football field, or never joined a committee to make decisions about their education. Thus, I decided to study informal teacher leadership because I wanted to prove that informal teacher leaders are the best and most valuable teachers.

As I began to observe interactions among students, colleagues, and administrators, I noticed that some fellow teachers possessed the ability to lead informally, but something was preventing them from publically engaging in extra-role behaviors (Organ, 1990). As I examined this phenomenon more intensely, I discerned that some of these same teachers actually were leading informally, yet privately. Basically, they were exceeding contractual expectations but pretending as if they assumed only those responsibilities required of them. In essence, a number of my colleagues were doing the same type of work for Bigland and its students as I, but they were hiding behind their efforts to avoid being the objects of non-leaders' animosity and ridicule. This phenomenon also inspired me to embark upon this qualitative study. Basically, I assumed

that if I could prove that informal teacher leaders are the most effective teachers, then I would be able to validate our informal leadership behaviors.

Ironically, this study has left me with more questions than answers. Instead of discovering that informal teacher leaders are the most effective teachers, I began to question what it means to be a good teacher and even a teacher in general. The respondents' notions of "bare minimum teaching practices" and descriptions of leadership behaviors prompted me to reflect upon my own practice. I learned that although I am self-motivated, and much of my informal leadership behaviors are inspired by my students' specific learning needs, I also choose to assume additional responsibilities because I am motivated by verbal praise and the personal benefits I gain from engaging in professional development opportunities. If all my reasons for leading informally are not directly related to my students, colleagues, or school, then conceivably my intentions for leading are not what I once thought.

Perhaps the most successful teachers simply are those who are comfortable with themselves and their work. Maybe these teachers, who know themselves personally, are the most effective professionally. I still struggle to determine factors that positively influence school reform because endless variables affect student achievement because "student achievement" can be perceived in various ways. In addition, I continue to question my own role within the dynamic system of American public schools.

Nevertheless, I look forward to initiating future research as an outcome of this study. Inevitably, additional research will yield more questions. After all, learning is often more about the questions one explores than the answers one discovers.

APPENDIX A

QUESTIONNAIRE USED BY PRINCIPALS TO SELECT POTENTIAL

RESPONDENTS FOR STUDY

The following questionnaire was distributed to principals who agreed to participate as key informants in this study. The intention of this survey was threefold. First, principals used the questionnaire to assist them with identifying informal teacher leaders as potential respondents. The questionnaire ensured that principals identified respondents according to the operational definition of informal teacher leadership and the description of informal teacher leaders employed for the purposes of this study (This information is presented in Chapter 1). Next, principals used the questionnaire to identify additional respondents - teachers who do not fit the operational description of "informal leader". Finally, principals' responses to the questionnaire allowed me to recognize those behaviors of informal teacher leaders that principals deem most important in terms of exercising leadership. Since one of the purposes of this study is for me to propose ways for educators to reinforce informal teacher leadership within their schools, I employed the questionnaire in order to generate empirical data regarding the specific behaviors that principals might recognize in teachers with the capacity to lead informally. Essentially,

313

principals' responses to the questionnaire informed the questions I asked during formal, semi-structured, in-depth interviews with all respondents.

Questionnaire for Principals to Identify Potential Respondents

Your Name:
School:
Name of Teacher Identified:

Respond to the following questions regarding the teacher you have identified.

1. For the purposes of this study, an informal teacher leader is identified as an educator who willingly and voluntarily exhibits extra-role behavior – behavior beyond or in addition to that which is identified as per the terms of the teachers' contract – for which he/she receives no financial or time compensation. Does this teacher demonstrate extra role behavior? Circle either "Yes" or "No" below. If so, then describe in detail the extra-role behavior that this teacher demonstrates. If you need more space, then feel free to write your response on another sheet of paper and attach it to this sheet.

NO   YES   Description of behavior:

2. The following is a list of behaviors in which typical informal teacher leaders engage. On the line next to each behavior listed, indicate how frequently, in your opinion, this teacher engages in that behavior. Use the following scale:

- 0 = This teacher never engages in this behavior.
- 1 = This teacher rarely engages in this behavior.
- 2 = This teacher sometimes engages in this behavior.
- 3 = This teacher usually engages in this behavior.
- 4 = This teacher always engages in this behavior.

Also, please write comments or provide examples if you believe it will help the researcher develop a clearer picture of this teacher's behavior.

_____ Builds trust and rapport among colleagues without force
Comment(s) or example(s):

_____ Maintains a clear sense of purpose
Comment(s) or example(s):

_____ Accepts change
Comment(s) or example(s):

_____ Enacts change
Comment(s) or example(s):

_____ Models professional growth
Comment(s) or example(s):

_____ Demonstrates self-motivation
Comment(s) or example(s):

_____ Demonstrates enthusiasm
Comment(s) or example(s):

_____ Exercises creativity
Comment(s) or example(s):

APPENDIX B

LETTER TO POTENTIAL RESPONDENTS

Once each school principal identified informal teacher leaders and teachers who do not assume informal leadership responsibilities, those teachers were sent the following document. This memo, a formal invitation to teachers to act as participants in this study, briefly outlined the study's purposes and their involvement should they wish to participate. Upon receiving the letter, teachers were asked to contact me if they wished to participate in the research. Therefore, those who contacted me served as respondents for this study.

<center>Letter to Potential Respondents</center>

Dear _____,

Our middle school has been selected as the setting for a research study on informal teacher leadership, which has been approved by the University of Pittsburgh. I invite you to participate in this study, conducted by Ms. Constance DeMore Palmer, a doctoral student enrolled in the University's graduate education program. As a middle school teacher who is interested in maintaining lasting school reform, she currently is conducting research on informal teacher leadership.

Informal teacher leaders are teachers who willingly and voluntarily demonstrate extra-role behaviors or assume responsibilities in addition to those identified as per the terms of the teachers' contract. As a result of this study on informal teacher leadership, Ms. Palmer wishes to learn about informal teacher leadership from the perspective of classroom teachers so that she might suggest to educators – namely school principals – how they might promote and sustain informal teacher leadership within their schools. I am inviting you to participate in this study because I recognize in you the types of leadership characteristics or behaviors that Ms. Palmer is investigating. Therefore, I encourage you to take part in this research so that Ms. Palmer might learn from you, a fellow educator.

If you agree to participate in this study, then you will be asked to take part in two to three hours of formal, in-depth, semi-structured interviews conducted at <u>times and locations of your choice</u>. Following the interview(s), you will be given the opportunity to author a short vignette to reflect upon the interview process and your responses to the questions asked. With your approval, all communications will be audio-recorded and transcribed. Then, you will have a chance to review the transcripts and delete, modify, or elaborate on any of your responses. Since all of these processes take time, and since your time is valuable, you will receive a small, "thank-you" gift for your participation. In addition, you might gain a stronger understanding of your own role as an educator.

The risk for your participation in this University-approved study is *extremely* low. Information collected will be used only for research. The written data will be kept confidential by storing it in a locked drawer, and all audio-recordings will be destroyed upon completion of the study. Research data, including quotations from interviews and discussions, will be reported in a dissertation. Results from this study also may be published in an academic journal or as a conference paper, which may include quotations from interviews. A pseudonym will be used in lieu of your name, and Ms. Palmer will not disclose your identity even to me. Although you may be thinking, "My principal will remember who he recommended for this study, so my anonymity cannot be protected," know that I have recommended more participants than Ms. Palmer needs. Since I cannot be certain which teachers I have recommended actually will take part in this study, your anonymity will be protected.

Participation in this study is voluntary. Even if initially you agree to participate, you may refuse to participate, refuse to answer any question(s), or withdraw from the study at any time with absolutely no effect on your employment status or reputation. If, at any time, you have questions or concerns about the conduct of this study or your rights as a participant, you may contact the University of Pittsburgh's Institutional Review Board at 412.383.1480. Should you have questions or concerns about this research, or any comments to make now or at a later date, please contact Dr. Michael Gunzenhauser, Ms. Palmer's research advisor and professor at University of Pittsburgh, at 412.648.2119 or mgunzen@pitt.edu.

I greatly appreciate any consideration you give to this request. Please contact Ms. Palmer at your earliest convenience if you wish to help her complete her research. You may contact Ms. Palmer via either telephone at 412.601.1588 or e-mail at cfd5@pitt.edu. This letter is yours to keep for future reference. She looks forward to hearing and learning from you.

Sincerely,

APPENDIX C

CONSENT FORM FOR GRADUATE RESEARCH STUDY

Respondents who agreed to participant in this qualitative study of informal teacher leadership were asked to read, sign, and date the following *Consent Form for Graduate Research Study*, as mandated by the University of Pittsburgh's Institutional Review Baord. The purpose of the form was to provide participants with documentation ensuring their rights, including the confidentiality of their involvement in the study. The form also presented the researcher's responsibilities.

Consent to Act as a Participant in a Research Study

TITLE: Insiders' Voices: A Phenomenological Study of Informal Teacher Leadership

from the Perspective of Those Who Choose to Lead

PRINCIPAL INVESTIGATOR: Constance F. DeMore Palmer, M.Ed., Graduate Student

University of Pittsburgh, School of Education

Department of Administrative and Policy Studies

Telephone: 412-601-1588

E-mail: cfd5@pitt.edu

RESEARCH SUPPORT: Michael Gunzenhauser, Ph.D. , Research Advisor

University of Pittsburgh, School of Education

Department of Administrative and Policy Studies

Telephone: 412-648-2119

E-mail: mgunzen@pitt.edu

ACADEMIC SUPPORT: Mary Margaret Kerr. Ph.D., Academic Advisor

University of Pittsburgh, School of Education

Department of Education

Telephone: 412-648-7205

E-mail: mmkerr@pitt.edu

319

Why is this research being done?

You are being asked to participate in a research study in which I will investigate the phenomenon of informal teacher leadership from the perspective of middle level educators. Informal teacher leaders are teachers who willingly and voluntarily demonstrate extra-role behaviors or assume responsibilities in addition to those required as per the terms of the teachers' contract. Informal teacher leadership has been linked to lasting school reform. As a result of this study, I intend to suggest to middle level educators – namely middle school principals – how they might promote and sustain informal teacher leadership within their schools. I also hope to gain a better understanding of myself as an informal teacher leader of a middle school who still struggles to identify her role.

Who is being asked to take part in this research study?

Middle level educators are being asked to take part in this research study. You are being invited to take part in this research study because you are an educator who can provide information regarding informal teacher leadership, a phenomenon present in every school setting and with which every educator is familiar. Moreover, you, an educator who works in a suburban, middle school environment, will be able to speak about informal teacher leadership as it occurs in a middle school environment.

What procedures will be performed for research purposes?

In-Depth, Semi-Structured Interviews:

You will be asked to take part in two to three in-depth, semi-structured interviews of approximately one hour each. You may choose the locations of the interviews, and interviews

will be scheduled on days and times convenient for both of us. During interviews, you will be

asked to speak about your day-to-day activities and behaviors as an educator; thus, the interviews

will be about topics that are non-sensitive. With your permission, I will audio-record the

interviews. As a research procedure, I will transcribe the recordings for the purpose of accuracy.

Review of Interview Transcripts:

All interviews will be transcribed. Then, for the purpose of accuracy, you will be given an

opportunity to review the transcripts and delete, modify, or elaborate on any of your responses.

Personal Narratives:

Following each interview, you will be given the opportunity to author a short vignette to reflect

upon the interview process and your responses to the questions asked. For the purpose of

accuracy, you might want to clarify your responses or offer additional information regarding the

topics addressed during the interview. You also may want to suggest topics for subsequent

interviews.

What are the possible risks of this research study?

For the following reasons, the risk for your participation in this study is extremely low.

1. During interviews and in personal narratives, you will be asked to address your typical, day-to-day activities and behaviors, or the typical, day-to-day activities or behaviors of your colleagues (If you speak about a colleague's activities or behaviors, then you will be asked to refrain from naming him or her). Therefore, interviews will be about topics that are non-sensitive.
2. Although your school principal has *recommended* you and some of your colleagues for participation in this study, he/she will not know which teachers have chosen to participate. This will ensure your anonymity.
3. During interviews, in all transcripts, and in all written documentations, you will be assigned a fictitious name. Only you and I will know your real name, and I promise not to disclose your identity at any time before, during, or after this research study. This also will ensure your anonymity.
4. Information collected will be used only for research purposes. Findings will be reported in a dissertation, and results also may be published in an academic journal or as a paper

presented at conferences. Findings may include quotations from interviews; however, pseudonyms in lieu of actual names will be used to identify speakers. This too will ensure your anonymity.

5. To ensure your confidentiality, all audio-recordings, transcripts, and data gathered will be stored in a locked drawer unless in use.

6. To further ensure your confidentiality, all audio-recordings will be destroyed upon completion of this study, or upon your withdraw from the study should you wish to discontinue your participation.

What are the possible benefits from taking part in this study?

A direct benefit from taking party in this study cannot be guaranteed. However, during this research study, you will be asked to reflect extensively upon your practice as an educator. Personal reflection has been found to enhance professional practice. Therefore, you may grow personally and professionally as a result of taking part in this study.

Will I be paid if I take part in this research study?

You will not be paid to take part in this research study.

Who will know about my participation in this research study?

Your school principal has *recommended* you as a potential participant in this research study; however, he/she has recommended a larger number of teachers for participation than needed. Of all those recommended from your school, no more than nine educators will participate. Therefore, your school principal cannot be certain as to whether or not you will participate. For this reason, as well as for the points listed above to address the nature of risk, no one aside from the two of us will be certain if you are participating in this study.

Who will have access to identifiable information related to my participation in this research study?

No one, aside from me, will have access to identifiable information related to your participation in this research study. Even my research and academic advisors will not have access to information that identifies you personally.

For how long will the researcher be permitted to use information related to my participation in this research study?

This research study will begin no earlier than June 1, 2009 and will end no later than June 1, 2010. After June 1, 2010 (and perhaps earlier if the study is completed prior to June 1, 2010), information related to your participation in this research study no longer will be used.

May I have access to information that results from my participation in this research study?

After the study is completed and if you are interested in obtaining one, I will provide you with a written report of findings.

Is my participation in this study voluntary?

Your participation in this research study, as well as your consent to allow interviews to be audio-recorded, is completely voluntary (However, if you do not provide your written consent to participate in this study, you will not be able to act as a participant). Whether or not you provide your consent for participation in this research study will have no effect on your current or future relationship with the University of Pittsburgh. Whether or not you provide your consent for participation in this research study will have no effect on your current or future work as an

educator. Whether or not you provide your consent for participation in this research study will have no effect on your reputation as a professional or as an individual.

May I withdraw, at a future date, my consent for participation in this research study?

Even if initially you agree to participate in this research study, you may refuse to participate, refuse to answer any question(s) during interviews, or withdraw from the study at any time with absolutely no effect on your employment status or reputation. If you choose to withdraw your consent to participate, any audio-recordings of interviews, transcripts, data gathered, or reports generated resulting from your participation will be destroyed. To formally withdraw your consent for participation in this research study, you should provide me with a written and dated notice of this decision.

If, at any time, you have questions or concerns about the conduct of this study or your rights as a participant, you may contact the Human Subjects Protection Advocate at the University of Pittsburgh's Institutional Review Board at 1-866-212-2668. Should you have questions or concerns about this research, or any comments to make now or at a later date, you may contact Dr. Michael Gunzenhauser, my research advisor and professor at University of Pittsburgh, at 412-648-2119 or mgunzen@pitt.edu (Understand that you will have to identify yourself as a participant in this study if you choose to contact either the Institutional Review Board or Dr. Michael Gunzenhauser).

If I agree to take part in this research study, can I be removed from the study without my consent?

The nature of this qualitative research is such that there would be no reason to remove you from the study without your consent.

VOLUNTARY CONSENT

The above information has been explained to me and all of my current questions have been answered. I understand that I am encouraged to ask questions about any aspect of this research study during the course of the study, and that such future questions will be answered by a qualified individual, the researcher, or the researcher's advisor listed on the first page of this consent document at the telephone numbers given. I understand that I may always request that my questions, concerns, or complaints be addressed.

I understand that I may contact the University of Pittsburgh's Institutional Review Board to discuss problems, concerns, and questions; obtain information; offer input; or discuss situations that have occurred during my participation.

By signing this form, I agree to participate in this research study. I understand that I may participate in this research study without having my interviews audio-recorded (I have indicated my wishes below).

_____ I wish to participate in the study described above, have read this consent form, and agree to have my interviews audio-recorded.

_____ I wish to participate in the study described above and have read this consent form, but I do not agree to have my interviews audio-recorded.

Participant's Signature

_____

Printed Name of Participant

_____

Date

_____

CERTIFICATION OF INFORMED CONSENT

I certify that I have explained the nature and purpose of this research study to the above-named individual, and I have discussed the potential benefits and possible risks of study participation. Any questions the individual has about this study have been answered, and I will always be available to address future questions as they arise.

Printed Name of Person Obtaining Consent: Constance F. DeMore Palmer

Role in Research Study: Primary Investigator

Signature of Person Obtaining Consent

_____

APPENDIX D

INTERVIEW GUIDES

The following interview guides initially were used to prompt respondents to speak about the issues addressed in this study. Interview guides, presented below, were designed to help specific groups of respondents speak about the issue of informal teacher leadership. Interview questions were framed according to the research questions guiding the study. Every interview began with some basic questions to help respondents feel comfortable with the interactive nature of the interviews and with the audio-recording device used during the interviews (if they permitted audio-recording). These basic questions provided context and demographic information, and basically set the tone for the interaction that occurred. Such basic questions asked of each respondent included:

- Are you comfortable with the location and workings of the audio-recording device?

- What questions do you have for me before we begin?

- For how many years have you been an educator?

- Briefly explain to me why you decided to become an educator.

- How long have you held your current position at this school district?

- Briefly describe the nature of your position at this school.

D.1 INTERVIEW GUIDE FOR SCHOOL PRINCIPALS

The following questions guided the interviews with school principals:

- How do you define "leadership"?
- How do you define "teacher leadership"?
- Explain your role(s) as a school principal.
- How do you perceive informal teacher leaders as individuals within the dynamic system of American public schooling?
- Do you perceive informal teacher leaders as influential in terms of increasing student achievement? If so, then explain how informal teacher leaders influence student achievement. If not, then why not?
- Tell me about your relationship with the informal teacher leaders in your school.
- In your opinion, what is the role of informal teacher leaders within your school?
- Tell me about your relationship with teachers who do not act as informal leaders in your school.
- In your opinion, what is the role of teachers (who do not act as informal leaders) within your school?
- How do you think the informal teacher leaders in your school perceive themselves?
- How do you think the informal teacher leaders in your school perceive their role(s)?
- How do you think teachers who are not informal leaders perceive teachers who are?
- Describe the culture in this school.
- Give me some examples of how the culture or conditions in this school influences informal teacher leaders/leadership.
- Explain actions you take to promote and sustain informal teacher leadership.
- Explain intentional actions you take to discourage informal teacher leadership.
- Reflect upon any of your actions that unintentionally may discourage informal teacher leadership, and describe them.
- Tell me why, in general, some teachers might develop into informal leaders while others do not.
- Tell me what specific aspects of the culture or what conditions in this school might dissuade teachers from becoming informal leaders.
- Describe the behaviors which you consider extra-role behaviors for teachers.
- Why do you think informal teacher leaders choose to engage in extra-role behaviors?
- Why do you think some teachers choose not to engage in extra-role behaviors?
- What question(s) would you like to ask informal teacher leaders, if given the opportunity? Why would you ask that?
- Take a moment and think of any additional information you can give me regarding informal teacher leaders or informal teacher leadership. What other information can you add to this interview?

D.2 INTERVIEW GUIDE FOR INFORMAL TEACHER LEADERS

The following questions guided the interviews with informal teacher leaders:

- How do you define "leadership"?
- How do you define "teacher leadership"?
- Explain the role(s) of any classroom teacher.
- Explain your role(s) as an informal teacher leader.
- How do you perceive your role(s) within the dynamic system of American public schooling?
- Do you perceive yourself as influential in terms of increasing student achievement? If so, then explain how. If not, then why not?
- How do you think other informal teacher leaders in your school perceive their role(s)?
- Describe the behavior(s) that all teachers – both teacher leaders and those who choose not to lead – should exhibit.
- Describe the behaviors you exhibit that are "extra-role," or those in addition to the behaviors that, in your opinion, all teachers should exhibit.
- Describe the behavior(s) of a colleague whom you consider an informal teacher leader.
- Tell me about your relationship with the school principal(s).
- Tell me about your relationship with teachers who do not act as informal leaders in your school.
- Tell me about your relationship with your teaching colleagues who also choose to act as informal leaders.
- How do you think the school principals perceive you?
- How do you think other informal teacher leaders in your school perceive you?
- How do you think your colleagues who do not act as informal teacher leaders perceive you?
- Describe the culture in this school.
- Give me some examples of how the culture or conditions in this school might influence you to act as an informal teacher leader.
- Give me some examples of how the culture or conditions in this school might dissuade you from acting as an informal teacher leader.
- Why do you choose to act as an informal teacher leader?
- Walk me through how you have come to serve as an informal teacher leader.
- Tell me why, in your opinion, some teachers might develop into informal leaders while others do not.
- Why do you think informal teacher leaders choose to engage in extra-role behaviors?
- Why do you think some teachers choose not to engage in extra-role behaviors?
- What question(s) would you like to ask other informal teacher leaders, if given the opportunity? Why would you ask that?
- What question(s) would you like to ask colleagues who do not choose to lead? Why would you ask that?

- Take a moment and think of any additional information you can give me regarding informal teacher leaders or informal teacher leadership. What other information can you add to this interview?

D.3 INTERVIEW GUIDE FOR TEACHERS WHO CHOOSE NOT TO LEAD

The following questions guided the interviews with teachers who choose not to lead:

- How do you define "leadership"?
- How do you define "teacher leadership"?
- Explain the role(s) of any classroom teacher.
- How do you perceive your role(s) within the dynamic system of American public schooling?
- Do you perceive yourself as influential in terms of increasing student achievement? If so, then explain how. If not, then why not?
- Explain the role(s) of your colleagues who clearly are recognized as informal teacher leaders.
- How do you think informal teacher leaders in your school perceive their role(s)?
- Describe the behavior(s) that all teachers – both teacher leaders and those who choose not to lead – should exhibit.
- Describe any extra-role behaviors you exhibit, if any.
- Describe the behavior(s) of a colleague whom you consider an informal teacher leader.
- Tell me about your relationship with the school principal(s).
- Tell me about your relationship with teachers who do not act as informal leaders in your school.
- Tell me about your relationship with your teaching colleagues who choose to act as informal leaders.
- How do you think the school principals perceive you?
- How do you think informal teacher leaders in your school perceive you?
- How do you think your colleagues who do not act as informal teacher leaders perceive you?
- Describe the culture in this school.
- Give me some examples of how the culture or conditions in this school might influence you positively.
- Give me some examples of how the culture or conditions in this school might influence you negatively.
- Tell me why, in your opinion, some teachers might develop into informal leaders while others do not.
- Why do you think informal teacher leaders choose to engage in extra-role behaviors?
- Why do you think some teachers choose not to engage in extra-role behaviors?

331

- What question(s) would you like to ask informal teacher leaders, if given the opportunity? Why would you ask that?
- What question(s) would you like to ask colleagues who do not choose to lead? Why would you ask that?
- Take a moment and think of any additional information you can give me regarding informal teacher leaders or informal teacher leadership. What other information can you add to this interview?

TEMPLATE USED TO RECORD TRANSCRIBED DATA

The following template was used to record transcribed data and data gleaned from observations

of respondents during interviews.

Template Used to Record Transcribed Data

Date, Time, and Location of Interview			
Description of Interview Setting			
Description of Respondent			
Transcription		My Thoughts or Interpretation	Code(s)/ Research ?(s)

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