A LONGITUDINAL DEVELOPMENTALLY INTENTIONAL LEADERSHIP INSTITUTE

FOR TEACHER LEADERS:

A CASE STUDY OF THE EXPERIENCES OF 13 TEACHER LEADERS

Christy Joswick-O’Connor

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Abstract

A Longitudinal Developmentally Intentional Leadership Institute For Teacher Leaders: A Case Study Of The Experiences Of 13 Teacher Leaders

Christy Joswick-O’Connor

The purpose of this study was to explore the experience of 13 informal teacher leaders who participated in a three-year (district-sponsored and job-embedded) developmentally intentional leadership institute (DILI) and to learn how, if at all, the DILI helped them develop and apply leadership skills, as they continued in their primary roles as teachers.

The DILI at the center of my study aimed to develop leadership capacity as a way to overcome barriers to teacher leadership that are described in the literature. I found three features of the DILI that supported this: 1) Using best practices in professional development; 2) Administrators’ participation alongside their teachers; 3) A developmentally intentional curriculum based on Learning-Oriented Leadership.

I utilized an exploratory case study methodology, including a district-wide survey of 67 teachers to understand the context of the research site and 34 hours of interviews with three sets of participants including the 13 teachers who completed the three-year DILI, 3 teachers who partially completed the DILI (i.e. completed one or two years), 3 principals and 3 district administrators who directly supervised the teacher leaders.

I came to three clusters of findings. First, the DILI created a holding environment for participants (i.e., supported and challenged them, while remaining in place longitudinally) (13/13) which they utilized as a support to their learnings and leadership practice. Second, participants engaged in three perspective shifts [i.e., on themselves (13/13), on the nature of
leadership (9/13), and on the utility of collaboration (13/13)]. Third, all 13 teachers transferred their learnings from the DILI to assume acts of leadership in their schools. This included assuming formal leadership responsibilities (13/13), feeling more empowered (13/13) and feeling less stress, even as they took on greater responsibilities (10/13). Moreover, the administrators reported that the teacher leaders positively influenced the district, as they created a “ripple effect” and “lifted the bar” to elevate expectations, professionalism, and practices of collaboration.

Implications of my study address the use of this approach (i.e., DILI) by districts to foster teacher leadership, even amidst school cultures of egalitarian norms. These teacher leaders helped to shift culture by driving instructional improvement. Thus, districts can utilize teacher leadership as a way to better address increased standards, greater expectations, and other challenges that place too many demands on school administrators to lead alone.
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Dedication

The beautiful spirits of my children, Liam and Ella, make this world a better place. I thank them for all of their patience and help along this journey. I thank them both for our time “studying” together. I thank Ella for finding me at midnight and forcing me to stop working. I thank Liam for his “notes” on drafts of writing – and sometimes books – that brought me cheer and strength, long after he had left my side. They have been the constant source of inspiration behind every page of this dissertation and everything I do. This work is dedicated to Liam and Ella.
CHAPTER I: INTRODUCTION

As the world rapidly changes around us, schools are challenged with the task of preparing students for jobs that have not yet been created in an increasingly diverse and interconnected society (Stewart, 2018). The 21st century has resulted in greater and more complex demands for educators of all kinds— including principals, teachers, and district level leaders (Bouffard, 2020; Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2018b, 2020; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Stewart, 2018; Wagner et al., 2006).

From 2001 to 2015, the United States introduced three major federal initiatives aimed to improve student, teacher, and school performance. These initiatives primarily sought to address inequities and the needs of an increasingly diverse student body by raising expectations through more rigorous standards, high stakes tests, and increased measures of accountability (Darling-Hammond & Richardson, 2009; Drago-Severson & Blum-DeStefano, 2018c; Khalifa et al., 2016; Ravitch, 2016; Stewart, 2018; Szeto & Cheng, 2018; Wagner et al., 2006; Weiner & Lamb, 2020).

As a result of a changing era in education, recent scholarship posits that school leadership is now too complicated for a single person. Newer recommendations include models of shared leadership between administrators and teachers (Boyce & Bowers, 2018; Forster, 2020; Hitt & Tucker, 2016; Troen & Boles, 2012; Wenner & Campbell, 2017; York-Barr & Duke, 2004). This shift in approach started at the turn of the century when Hallinger and Heck (1996) found that leadership has an indirect effect on student achievement, thus casting doubt on reform efforts that focused exclusively on the principal. Following Hallinger and Heck’s 1996 study, a conceptual shift introduced various models of shared and instructional leadership that called on administrators to partner with teachers in leading schools (Boyce & Bowers, 2018; Marks &
Printy, 2003; Murphy et al., 2007; Ogawa & Bossert, 1995; Prestine & Bowen, 1993). In response, theories of leadership introduced *shared instructional leadership* (Boyce & Bowers, 2018) or, “The collaboration of principals with teachers around curriculum, instruction, and assessment” (Marks & Printy, 2003, p. 370). They also introduced *leadership for learning*, which argues that leaders could improve student outcomes by building organizational processes and structures that support instruction-sharing leadership roles for teachers (Boyce & Bowers, 2018; Hitt & Tucker, 2016; Murphy et al., 2007). As theories of school leadership continued to develop, Louis et al. (2010) pointed out that the principal is not the sole agent in school improvement, as teachers have a more direct influence over classroom instruction – and a new emphasis was placed on *teacher leadership*. Creating school cultures that embrace models of shared leadership is a pressing challenge for schools today (Boyce & Bowers, 2018). Administrators struggle to understand how to share leadership with teachers (Weiner & Lamb, 2020) and leadership preparation programs struggle to support teachers in developing leadership skills that *transfer* to their schools amidst the barriers to teacher leadership (Wenner & Campbell, 2017).

In this study, I investigated a developmentally intentional leadership institute (DILI) that aimed to foster and support the development of teacher leadership. That is, I worked with the 22 attendees of a teacher leadership DILI in a small school district in the Northeast to try to learn about the 16 teachers’ and six administrators’ experiences of a DILI and how they understand its influence on their emerging leadership practices. I designed and facilitated the DILI at the center of this study. Thus, I hope to contribute to our understanding of teacher leadership *development*, which is critical if districts and school administrators are to be successful in facing the increasing challenges of public education in the 21st century.
**Problem Statement**

The catalytic circumstances of increased standards, greater expectations, and measures of accountability have led to advances within prominent educational leadership theories. Recognizing that the complexity of school leadership requires an expansion beyond formally titled leaders (i.e., the principals and assistant principals) creates a need to support the development of teacher leaders (Boyce & Bowers, 2018). As teachers across the nation attempt to assume the leadership roles required by 21st century education, they face considerable challenges that limit their ability to exercise their leadership (Wenner & Campbell, 2017; York-Barr & Duke, 2004). Teachers report challenges such as prioritizing a varied workload, assuming leadership in a culture of egalitarianism, and unsupportive administrators (Wenner & Campbell, 2017). These challenges constitute *developmental demands*, or “expectations presented in work, leadership, and life that may be beyond the developmental capacities of those expected to perform them” (Drago-Severson, Blum-DeStefano, & Asghar, 2013, p. 268). Therefore, supporting teacher leaders means addressing the developmental demands teachers report as barriers (Drago-Severson, 2009, 2016a). However, the teacher leadership literature highlights a gap in our understanding of how to effectively support, nurture, and develop the skills required of teacher leaders (Leithwood et al., 2010; Neumeriski, 2012; Wenner & Campbell, 2017; York-Barr & Duke, 2004). When potential teacher leaders receive training, they struggle to transfer their leadership to their practice in their respective schools (Ado, 2016; Silva et al., 2000; Weiner & Lamb, 2020). Further, there is even less research that examines the impact and influence of teacher leadership training on schools (Bryant, 2017; Carver, 2015; Evertson, 2020; Goins, 2017; Lowery-Moore et al., 2016; Ross et al., 2011; York-Barr & Duke, 2004).
To the best of my knowledge, there are not any studies that explore the experience of teacher leaders in *developmentally intentional leadership institutes* that address the challenges reported in the literature to provide professional learning aimed at supporting the development of teacher leaders. The characteristics of a developmentally intentional leadership institute (DILI) include:

- Teachers have an opportunity to take part in professional learning that is developmentally intentional. That is, the institute recognizes developmental diversity and provides an array of developmentally appropriate support that meets the learners where they are so that they can be successful in this work and sets the stage for potential developmental growth.

- Teachers have an opportunity to engage in professional learning that is grounded in best practices in professional development (e.g., job-embedded, support of administrators, collaborative, and sustained; Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015).

- Teachers have an opportunity to learn and experience a developmental approach to leadership such as Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a).

- Teachers have an opportunity to learn the tools, developmental protocols (Drago-Severson, 2007, 2009, 2012a, 2016a), and approaches that equip them to engage in acts of teacher leadership, even when faced with external and internal barriers (e.g., egalitarian norms, developmental challenges).

Taken together a DILI can provide teachers with the skills and tools needed to engage in acts of leadership.
Drago-Severson’s Learning-Oriented Leadership is a model of school leadership and professional learning that utilizes the four *Pillar Practices* of teaming, collegial inquiry, mentoring, and providing leadership roles to support adults’ professional growth and development (Drago-Severson, 2004a, 2009, 2012a, 2016b; Drago-Severson & Blum-DeStefano 2018c, 2020; Drago-Severson, Blum-DeStefano, & Asghar, 2013). Most studies of Learning-Oriented Leadership center around the application of this model by formal school leaders (e.g., principals, department chairs) as part of their leadership practice (Benis Scheier-Dolberg, 2014; Codd, 2015; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Lippard, 2014; Kanarek, 2020). To the best of my knowledge, there are not any published studies that explore the application of Learning-Oriented Leadership as a way to develop informal teacher leaders through a *developmentally intentional* leadership institute (DILI). The DILI I created and led was designed to support teachers in overcoming barriers to teacher leadership (e.g. egalitarian norms, lack of administrative support, and an increased workload (Wenner & Campbell, 2017). Informal teachers and administrators co-participate in professional learning that utilizes a curriculum based on Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) and best practices in professional development (e.g. job-embedded, sustained, collaborative; Darling-Hammond et al., 2017, Every Student Succeeds Act, 2015) to support leadership development for teachers.

My study sought to address this gap by exploring the experience of 22 participants who participated in a longitudinal developmentally intentional leadership institute (DILI). The participants included 13 teacher leaders who completed the full three years of the DILI, 3 teachers who partially completed the DILI, and six administrators (i.e., three building principals,
a curriculum supervisor, the superintendent, and the business administrator). In my dissertation, I focused primarily – though not exclusively – on the 13 teachers who completed the program.

**Purpose**

The purpose of this qualitative study was to explore the experiences of 13 teachers who participated in a three-year developmentally intentional leadership institute (DILI) and to learn how, if at all, that institute helped them develop and apply leadership skills as they continued in their primary roles as teachers. The longitudinal program was designed to intentionally provide the range of supports teachers need to handle leadership responsibilities and grow their internal capacities. For example, participants learned about developmental approaches to supporting teams, engaging in critical conversations, taking a stand for what they believe in, and assuming leadership roles. Specifically, the DILI involved learning about developmental diversity, or their own and others’ meaning making system or ways of knowing (i.e., the developmental lenses they use to construct their understanding of the world around them; Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano 2018c, 2020), and how to use their knowledge of developmental diversity to support their practice as teacher leaders. They did this as they learned and applied developmental approaches to teaming, feedback, engaging in difficult conversations, and – in its third year – how to assume a leadership role.

In this study I sought to understand how, if at all, this district-sponsored, cohort-based longitudinal DILI – based on Drago-Severson’s (2009) Learning-Oriented Leadership model – influenced the leadership practice of informal teacher leader participants. My proposed study aimed to contribute to the teacher leadership literature in two ways:

1. To investigate how, if at all, a DILI based approach could develop teacher leaders.
2. To investigate whether, if at all, the teacher leaders actually engaged in leadership acts in their schools (i.e., transfer).

**Research Questions**

This study was be guided by four research questions.

1. How do 13 teacher leaders who took part in a developmentally intentional leadership institute (DILI) describe and understand the leadership responsibilities they assumed if any? What challenges, if any, do they report facing as they developed their leadership practice?

2. How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities?

3. What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their most significant work-related challenges, both in general and particularly around managing workload, collaboration, and teaming?

4. How do six school and district administrators (who directly supervise the teacher participants) describe and understand the influence of the three-year DILI on the formal and informal leadership practices of the teacher participants?

**Conceptual Framework**

This section provides an overview of the main bodies of the literature that informed my study. My study focused on a cohort of 13 teacher leaders who participated in a three-year DILI – that was based on Learning-Oriented Leadership – alongside their administrators. I sought to understand how these teachers experienced the challenges of taking up leadership work, what
aspects of the DILI were important and/or helpful to them as they engaged in acts of teacher leadership, and what influence, if any, their learning had on the district. While this was the primary focus, I also sought to learn from the experience of 3 teachers who partially completed the DILI, and the 6 administrators who participated in alongside the teachers.

In order to carry out this study, I have drawn upon four bodies of literature.

- Adaptive Leadership Theory
- Teacher Leadership
- Professional Development
- Learning-Oriented Leadership

Of course, many of these ideas are built on Robert Kegan's (1982, 1994, 2000) theory of adult development (i.e., Constructive-Developmental Theory) and Drago-Severson’s (2004a, 2007, 2009, 2012a, 2016a, 2018c) extensions and application of this theory to those who serve in schools. I will explore those connections in Chapter II. Figure 1, a Conceptual Framework and Understanding of the Demands of Teacher Leadership below, illustrates the major elements of my study.
Figure 1 provides a visual representation of the theoretical concepts that undergird this study. At the top of the figure, it states *National Context: Shared Leadership Responsibilities with Teachers* to describe the overarching setting of education today and the additional role that
teacher leaders are asked to adopt. This model of leadership is not without its challenges, especially for the teachers called upon to serve as informal leaders.

As Figure 1 shows, I categorize the challenges teacher leaders face as *adaptive challenges, technical challenges,* and *mixed challenges,* the three categories of challenges in adaptive leadership theory (Heifetz, 1994; Heifetz & Linsky, 2017; Linsky & Lawrence, 2011). The ovals in the middle of the figure describe the intentionally created *holding environment,* or a structure that provides both support and challenge to promote developmental growth (Drago-Severson, 2004a; Kegan, 1982; Winnicott, 1965). This is a critical element of *Learning-Oriented Leadership* (Drago-Severson, 2004a, 2009, 2012a, 2016a, 2018c; Drago-Severson & Blum-DeStefano 2018c, 2020), which serves as a model of professional learning to support teacher leaders. The inner oval names two other key elements of Learning-Oriented Leadership (i.e., *ways of knowing,* and the four *Pillar Practices* of *teaming, mentoring, providing leadership roles,* and *collegial inquiry).*

In the center of Figure 1 is the DILI, which was designed with developmental intentionality to support teacher leaders in learning to overcome the challenges of assuming leadership. The arrows at the bottom describe the possible influence this type of professional learning has on teachers and how they may have used their leadership to influence the district. In the next sections, I provide an overview of the four bodies of literature that informed my study. I begin by defining teacher leadership.

**Defining “Teacher Leadership”**

There are a plethora of definitions and descriptions of teacher leadership (Neumeriski, 2012; York-Barr & Duke, 2004). In this study, I use Wenner and Campbell’s (2017) definition, “Teacher leaders are teachers who maintain a K-12 classroom-based teaching role, while also
taking on the responsibility of influencing their peers” (p. 140). That is, *these teachers’ primary responsibility remains serving as classroom teachers*. Teacher leaders differ from formally established roles such as principals, directors of curriculum, or pupil services directors.

According to Troen & Boles (2012):

> Teachers become leaders in their schools by being respected by their peers, being continuous learners, being approachable, and using skills and influences to improve the educational practice of their peers. They model effective practices, exercise their influence in formal and informal contexts and support collaborative team structures within their school. They work in collaboration with principals and other administrators by facilitating improvements in instruction and promoting practices among their peers that produce improved student learning outcomes. (p. 30)

I use Wenner and Campbell’s definition because it clearly points to teacher leaders as *peers without a formal role and title*, and therefore includes a larger number of teacher leaders. Other definitions of teacher leadership often point to formal roles, such as coaches, department chairs, and professional developers (Smylie & Eckert, 2018). However, *informal* teacher leaders reflect the current wave of teacher leadership and therefore merit recognition and support. Furthermore, the findings from research regarding support for informal teacher leaders may be applicable to formal teacher leaders, as well. Despite not having a formal title or role, these sorts of teacher leaders may use a variety of approaches to influence their peers, such as hosting interclass visitations, leading faculty meetings, facilitating common planning time, leading team meetings, hosting a parents’ night, or leading a staff professional book club (Muijs et al., 2013). While these tasks may seem inconsequential to some, teachers report significant barriers in executing responsibilities associated with teacher leadership (Wenner & Campbell, 2017; York-Barr & Duke, 2004). That is, the adoption of such responsibilities by teachers is often *quite* consequential – both in effort and in impact. To better understand the challenges of teacher leadership I next describe *adaptive leadership theory* (Heifetz, 1994).
Adaptive Leadership Theory: Adaptive, Technical, and Mixed Challenges

Heifetz (1994) developed his adaptive leadership theory to describe the different types of challenges leaders face. Other researchers (Drago-Severson, 2004a, 2009, 2012a, 2016a; Linsky & Lawrence, 2011; Wagner et al., 2006) have extended adaptive leadership theory to describe the specific challenges facing education today. Below, I describe the three types of challenges identified in this theory.

The dilemmas facing school leaders can each be classified as adaptive, technical, or mixed challenges (Drago-Severson, 2009, 2012a, 2016a; Wagner et al., 2006). Educators today may face adaptive challenges – those in which both the exact nature of the problem and/or the source of solutions are unknown (Heifetz, 1994). For example, addressing the opportunity gap or the disparity of academic achievement between students from different socioeconomic status levels and ethnicities are adaptive challenges (Drago-Severson & Blum-DeStefano, 2019). The problem itself is complex and it is difficult to specify the underlining causes. While data analyses can reveal a discrepancy between the performances of students from more educated versus less educated households, understanding the problem and a solution requires delving into longstanding cycles of poverty and inequity in society (Khalifia et al., 2016). Narrowing the problem and implementing solutions is complex, and any remedy will require collaboration and change from all stakeholders – not just school authorities. Solutions that require this kind of work indicate adaptive challenges (Heifetz & Linsky, 2017).

Heifetz (1994) labeled dilemmas with a known solution as technical challenges. For example, if a school district analyzed its reading data and identified a deficit in phonics for their students, they have a clearly identified problem. School leaders could then implement a research-based curriculum known to address phonics and provide training and resources to teachers. A
second cycle of data collection might then reveal that the program remediated the problem, thus, student achievement had increased. While this kind of challenge is not necessarily easy, the problem is identifiable, and solutions are available.

A third type of challenge also exists. A mixed challenge has a clearly identified problem, however, the solution merits the same approach as an adaptive challenge (Heifetz et al., 2009). It requires collaboration, new learning, and a change in culture (Heifetz, 1994; Heifetz et al., 2009). Changing the culture of schools to adopt new models of leadership and to become inclusive of teacher leaders, presents a mixed challenge. This calls for a shift in the cultural norms of a school, and presses against longstanding cultures of sameness. This sort of culture of sameness is known as an egalitarian norm – one in which every teacher is considered organizationally equal and is only separated by length of tenure (Katzenmoyer & Moller, 2009; Murphy, 2005; Wagner et al., 2006). This challenge is a mixed challenge because it although it poses a clear problem (i.e., supporting teachers’ leadership and changing the culture of a school to accept the many leaders – including peer-to-peer leadership – required to manage today’s demands), the solution requires new learning and a shift in culture. That is, those willing to partake in leadership must collaborate and shift the culture of the school so that teacher leadership is accepted.

My study sought to explore how, if at all, a cohort of teacher leaders and administrators who participated in a three-year DILI that focused on collaboration and assuming leadership responsibilities utilized their learnings to influence their schools. I asked the teacher leaders about the challenges they faced and how – if at all – the DILI prepared them to manage their named challenges whether they be adaptive, technical, or mixed.

In addition to adaptive leadership theory, the current study is informed by teacher leadership research.
**Teacher Leadership**

Historically, there have been four waves of teacher leadership (Levin & Schrum, 2017). In the first wave, those in formal roles (e.g., a grade-level chair) were recognized as teacher leaders. In the second wave, new formal positions (e.g., curriculum or lead teacher) – positions that often took teachers out of the classroom – were recognized as teacher leadership roles. In the third wave, teacher leadership was broadened to include teachers serving as mentors and advisors, either in a formal or informal capacity. The fourth wave of teacher leadership includes both formal/assigned leadership roles (including grade level chairs or coaches) and a variety of informal roles.

Below, I describe the responsibilities that formal and informal teacher leaders execute, the benefits that occur when teachers assume these additional responsibilities, and the barriers that teachers face, as they attempt to execute them. I explain why understanding the demands and challenges of teacher leadership is a critical first step in providing support for teacher leaders. This understanding shaped my thinking in designing my interview protocols and the follow-up questions and prompts that I used during data collection.

**Responsibilities of Teacher Leaders**

Wenner and Campbell’s (2017) literature review revealed that teacher leaders have been responsible for extending their leadership beyond their classroom walls, supporting professional learning, participating in decision making, and collaborating with administrators to work toward improvement and change for the whole school. Examples of this work include teacher leaders attending and conducting professional development, facilitating team meetings, participating in administrative sessions, modeling lessons within their own and other teachers’ classrooms,
participating in data meetings, providing peer-to-peer feedback, sharing resources with colleagues, and engaging in professional learning.

Benefits of Teacher Leadership

When teachers assume leadership responsibilities it results in benefits for teachers, schools, and students (Donohoo, 2018; Fairman & Mackenzie, 2012; Harris & Jones, 2019; Harris & Muijs, 2003; Ingersoll et al., 2017; Jacques et al., 2016; Kendall, 2019; Louis et al., 2010; Neumeriski, 2012; Troen & Boles, 2012; Wenner & Campbell, 2017; Wixom, 2016; York-Barr & Duke, 2004). Through the execution of these additional responsibilities, teacher leaders benefit schools by helping to increase collaboration, sharing best practices, encouraging professional learning, and offering assistance to other teachers (Curtis, 2013; Harris & Muijs, 2003; Muijs & Harris, 2006; Natale et al., 2013; Sparks, 2020; Weiner & Lamb, 2020). Teachers who engage in leadership are associated with higher levels of retention and report greater job satisfaction (Harris & Muijs, 2003; Kendall, 2019; Natale et al., 2013; Wixom, 2016), all benefits to teachers. A 2010 study of over 2,500 teachers and student data from 90 schools revealed that higher student achievement is correlated with models of school leadership that have input from all stakeholders, including teacher leaders (Louis et al., 2010). A survey of 1,000,000 teachers and 25,000 schools revealed that schools with the highest levels of instructional and teacher leadership average at least 10 percentile points higher in both math and English Language Arts on state tests, compared to schools with the lowest levels – even after controlling for factors like school poverty, size, and location (Ingersoll et al., 2017).

Barriers to Teacher Leadership

Despite the benefits of teacher leadership, teachers report considerable barriers. For example, a misunderstanding around of teacher leadership, a lack of administrative support,
managing an increased workload, and – most prominently – overcoming egalitarian norms (Wenner & Campbell, 2017; York-Barr & Duke, 2004). As the research shows, the principal is catalytic to the success of teacher leaders (Browne-Ferrigno, 2016; Bryant, 2017; Cooper et al., 2016; Coughlin, 2015; Mason, 2016; Muijs & Harris, 2007; Silva et al., 2000; Sinha & Hanuscin, 2017; Szeto & Cheng, 2018; Taylor et al., 2011; Weiner & Lamb, 2020). A lack of support from the principal and a negative school culture limits a teacher leader’s ability to demonstrate leadership (Coughlin, 2015; Natale et al., 2013; Sinha & Hanuscin, 2017; Weiner & Lamb, 2020).

Furthermore, as informal teacher leaders often maintain both their traditional teaching role and additional responsibilities, they must find ways to split their time between teaching and leadership duties (Durias, 2010; Margolis & Huggins, 2012; Muijs & Harris, 2006; Patterson & Manning, 2010; Wenner & Campbell, 2017; York-Barr & Duke, 2004). In their review of the literature, Wenner and Campbell, reported the largest barrier to teacher leadership is overcoming egalitarian norms, or a culture of sameness and equality (Danielson, 2006; Murphy, 2005; Taylor et al., 2011; Wenner & Campbell, 2017; York-Barr & Duke, 2004). As teachers try to lead their peers, their leadership is in juxtaposition to the tension of pre-existing norms of equality (Katzenmoyer & Moller, 2009; Murphy, 2005). Thus, teacher leaders directly challenge the concept of egalitarianism by their mere existence (Katzenmoyer & Moller, 2009).

Despite these obstacles, teachers are often held accountable for executing leadership by current teacher competency standards (Danielson, 2014) evaluation tools, and models of leadership (Neumeriski, 2013; Supovitz, 2018; Weiner & Lamb, 2020). One major focus of my study was to deepen our knowledge of how teacher leaders understand these barriers. This
extended to a better understanding of how they approach these barriers, and their success (if any) in overcoming them.

**Teacher Leadership: A Developmental Demand**

Adult developmental theorists argue that the act of assuming leadership and executing leadership skills is a developmental demand (Drago-Severson, 2004a, 2009, 2012a, 2016a, Kegan, 1982, 1994, 2000; Kegan & Lahey, 2009; 2016). This suggests that teachers need support in developing their internal capacities – one’s wherewithal to handle complexity – which supports their ability to execute leadership (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Drago-Severson & Blum-De-Stefano 2018b). However, teachers rarely receive professional development in support of teacher leadership (Wenner & Campbell, 2017; York-Barr & Duke, 2004). When support is given, it is not usually effective in preparing teachers for the demands of leadership (Jacques et al., 2016). Thus, the practice of teacher leadership presents a wide range of challenges both to the teachers who are asked to assume leadership roles and to the school leaders who are asked to support teacher leadership.

Next, I describe contemporary methods of teacher leadership preparation in order to contextualize the DILI I studied.

**Professional Development for Teacher Leadership**

Professional development for teacher leaders occurs through many venues, including university coursework, district-sponsored professional development, on-the-job training, and through ongoing learning pursuits, such as National Board candidacy (Hunzicker, 2012, 2018; York-Barr & Duke, 2004; Wenner & Campbell, 2017). In 2019, the Consortium for Policy Research in Education (Berg et al., 2019) reviewed organizations, professional journals,
conference programs, and online data to identify 285 teacher leadership programs, organized into seven categories (i.e., credential programs, fellowship programs, award programs, teacher leader consultants, differentiated work programs, communities of practice, and professional advancement programs). While teacher leaders receive preparation in a myriad of ways, their findings reveal over half of the programs (i.e., 150) were university-based credential programs.

Many studies show that participating in teacher leadership preparation programs yields positive results for participants, including increased confidence, efficacy, and knowledge (Coughlin, 2015; Kendall, 2019; Lowery-Moore et al., 2016; Silva et al., 2000). Yet, there is a lack of research that describes the effective approaches needed to nurture teacher leadership skills, and even less research that describes the influence and impact of teacher leader training on schools (Bryant, 2017; Carver, 2016; Evertson, 2020; Goins, 2017; Lowery-Moore et al., 2016; Ross et al., 2011; York-Barr & Duke, 2004). Although research shows that the most common method of preparation is a university-based program (Berg et al., 2019), when teacher leaders receive training through these university-based programs (i.e., either in-person or online) teachers struggle to transfer their leadership to their practice in their respective schools (Ado, 2016; Coughlin, 2015; Hunzicker, 2018, Lowery-Moore et al., 2016; Silva et al., 2000). My research addressed this gap by studying a district-sponsored job embedded and developmentally intentional approach that included interviews with administrators to determine how, if at all, the teacher leader participants transferred their learnings from the DILI into their practice (RQ’s #4).

I next describe best practices in professional development to highlight the elements that many teacher leadership preparation programs incorporate to support teacher leaders and to further contextualize the DILI that the participants of my study experienced.
Best Practices in Professional Development

Kraft et al. (2018) reviewed sixty studies to determine best practices in professional development and revealed that the most effective professional development for teachers occurs when learning is job-embedded, collaborative (including a coaching component), and sustained (Every Student Succeeds Act, 2015; Learning Forward & Education Counsel, 2017). However, even when teacher leaders experience professional development with best practices, teacher leaders still struggle to overcome barriers in schools and assume acts of leadership (Wenner & Campbell, 2017). Perhaps explaining this, adult developmentalists argue that certain internal capacities are required to overcome adaptive and mixed challenges, and to assume leadership (Drago-Severson, 2004a; 2009; 2012a; 2016a; Kegan, 1994; Kegan & Lahey, 2001, 2009, 2016; Wagner et al., 2006). In order to support capacity building, teachers need the opportunity to experience informational and transformational learning.

Kegan (2000) differentiated between these two types of learning. Informational learning is learning focused on increasing the amount of knowledge and skills a person has (e.g., learning to teach a new math curriculum). Traditional professional development focuses on informational learning (Drago-Severson, 1994; Walsh, 2015). Transformational learning, on the other hand:

Helps adults better manage the complexities of work and life and results in a qualitative shift in how a person organizes, understands, and actively makes sense of their experience. When transformational learning occurs, it can lead to increased capacities (i.e., cognitive, interpersonal, and intrapersonal) to better manage the complexities of daily life and work. (Drago-Severson, 2004a, p. 17)

To meet today’s complex demands and to support leadership development, principals, district administrators, and teachers need professional development that provides opportunities to engage in activities that foster both informational and transformational learning (Drago-Severson, 2004a, 2009, 2012a, 2016a). Like Drago-Severson, I posit that exercising leadership
requires certain internal capacities (Drago-Severson, O’Connor, & Blum-DeStefano, 2018). Therefore, professional learning for teacher leaders merits a developmental approach that supports teachers where they are and gives them developmental supports to address the barriers of leadership. This can potentially produce developmental growth.

The last body of research that informed my research was Learning-Oriented Leadership, which is a developmental model of leadership and professional development that has been extended to support teacher leadership in the DILI which was at the heart of my study.

**Learning-Oriented Leadership**

Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013) aims to shape schools into learning centers for collaborative learning “where educators support and challenge each other to grow” (Drago-Severson, 2009, p. 7). This model comprises of four collaborative practices, *Pillar Practices*, that are informed by developmental principles. Employing these practices with “developmental intentionality” (Drago-Severson, 2009, p. X) can support and challenge individuals with different *ways of knowing* (i.e., qualitatively different ways of making sense of their experiences; Drago-Severson, 2004a, 2009). The Learning-Oriented Leadership model has been found to be helpful in supporting adults’ professional development and growth by creating a space where adults are provided both appropriate supports and challenges so that they might grow, and can increase their self-awareness, examine assumptions, engage in collegial learning, and hold critical conversations – all which increase abilities to manage complexity (Drago-Severson, 2004a, 2009, 2012a, 2012b, 2016a; Drago-Severson & Blum-DeStefano, 2019; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Kegan, 1982, 1994, 2000). Supporting a developmentally diverse
group of learners requires an array of supports and challenge to meet the different needs of each member of the group.

**Pillar Practices**

The four Pillar Practices of the Learning-Oriented Leadership model are: *teaming*, *providing others with leadership roles*, *collegial inquiry*, and *mentoring*. Each pillar practice attends to developmental diversity by supporting adults of all ways of knowing, such as with reflective and collaborative practices in a *holding environment* that considers their developmental needs (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2019; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, Roy, & von Frank, 2015). A foundational concern of Learning-Oriented Leadership is that developmental diversity can be found in virtually any group of adults (Drago-Severson, 2004a). That is, adults within the group may make sense of the world through a range of developmental lenses or ways of knowing. My research aimed to further explore how the Learning-Oriented Leadership model can be used both as a developmental approach to support teacher leadership and as a model for teacher leadership, itself.

**Holding Environment**

In 1965, pediatrician and psychoanalyst Donald Winnicott coined the term *holding environment*, “to describe the safe environments mothers fostered to support their infants’ growth and development” (as cited in Kegan, 1982, p. 115). The idea of a holding environment has since been extended. For example, a holding environment can support adults’ growth by intentionally creating a balance of support and challenge. This balance “can lead to the growth of internal capacities, as it allows for a safe space where one can reflect and engage in
transformational learning, or a type of learning that changes the way we understand our reality” (Drago-Severson, 2009, p. 12).

Drago-Severson (2004a, 2007, 2009, 2012a, 2012b, 2016a) describes the three requirements for a good holding environment:

- It meets (i.e., supports) the person where they are, developmentally.
- It provides opportunities to grow (i.e., challenges).
- It stays in place to provide stability during the growing process.

The cohort and the curriculum I studied were developmentally intentional. The format of the DILI was designed to serve as a holding environment that provides a safe, challenging, and nurturing experience for learners with a range of developmental diversity.

A second tenant of Learning-Oriented Leadership is understanding developmental diversity. That is, just as there is racial and ethnic diversity in groups, there is diversity among how adults also make sense of the world with their different meaning-making systems (i.e., ways of knowing; Drago-Severson, 2004a, 2009, 2012a, 2016a). The DILI attended to developmental diversity through the use of developmentally intentional protocols (Drago-Severson, 2009, 2012a, 2016a) and through the deliberate design of the professional learning structure (Drago-Severson, 2004a).

**Developmental Diversity and Ways of Knowing**

Robert Kegan (1982, 1994, 2000) described a sequence of six developmental orders, or meaning-making systems, throughout the lifespan. Drago-Severson (2004a) called these meaning-making systems *ways of knowing* and discussed them as “the ways we interpret and respond to the world around us” (Drago-Severson, 2012a, p. 19). She (2004a, 2007, 2009, 2016a) described the spectrum of the four ways of knowing that are most common among adults
and refers to them as *instrumental, socializing, self-authoring*, and *self-transforming*, respectively.

Each way of knowing has strengths and limitations. While one way of knowing is not necessarily better than another, and certainly does not equate to greater happiness, there is a range of complexity that each way of knowing is comfortable managing (Drago-Severson, 2004, 2009, 2012a, 2016a). Therefore, more complex ways of knowing may be better suited to meet the demands of leadership (Drago-Severson, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, O’Connor, & Blum-DeStefano, 2018). Many scholars argue that exercising leadership requires a *self-authoring* way of knowing (Drago-Severson, 2009, 2012a, 2012b, 2016a; Drago-Severson & Blum-DeStefano, 2016, 2018c, 2020; Kegan & Lahey, 2009, 2016). When individuals experience developmentally appropriate supports and challenges, people can evolve through these ways of knowing, over the course of their lives.

I designed the DILI to utilize an understanding of adult development and Learning-Oriented Leadership to provide supportive and challenging conditions for informal teachers to grow their leadership capacity.

**My Relationship to this Research**

For 12 years, I have served as a teacher, academic coach, and administrator – in the South Bronx and in high achieving suburban school districts. In both settings, I have worked alongside fellow educators to try to help every child succeed as we navigated changing national policies, new curricular standards, and high stakes tests. I developed a notion that caring for teachers and their development would help reach a wider scope of students beyond just those in my classroom. Thus, my journey as a teacher leader began.
As a teacher leader, I experienced barriers that mirrored those reported in the literature. For example, one day, my friend across the hall and I were lamenting that parents were confused about our literacy program. I said that I was willing to host a parent literacy night on behalf of our team, as a way to help other teachers, students, and the school. My friend replied, “Christy you cannot do that; it’ll make the rest of us look bad.” As a result of that comment – which I can now recognize as an example of egalitarian norms – I never hosted the parent literacy night. Our parents remained confused about the program, and our teaching staff remained frustrated with their misunderstandings.

I came to Teachers College (Columbia University) searching for how to best support the adults in our care and help other teachers. In a class on adult development with world-renowned scholar, Dr. Ellie Drago-Severson, I realized that I could not host the parent literacy night because of my own developmental capacity. I did not yet possess the capacity to stand up for what I believed in. As I explored adult development as a student, I grew in self-awareness and learned how I had been making sense of my experiences. This growth better equipped me to handle the complexities of leadership, and I was better able to support others.

I continued to work with Dr. Drago-Severson to bring what I had learned about Learning-Oriented Leadership to other teachers. At that time, I was a curriculum coach in a K-12 school district in the Northeast. This led to the creation of a two-year developmentally intentional learning institute (DILI) that appeared to produce positive gains for the teachers as they grew in self-efficacy (Langer-Banker, 2017). However, there was minimal principal and district administrator participation. Having learned that an unsupportive administrator is a common barrier to teacher leadership (Durias, 2010; Wenner & Campbell, 2017), I began to wonder what would be possible if the administrators participated in the DILI alongside the teachers?
Three years ago, I accepted a new position as a supervisor in another school district (K-8) in the Northeast. I accepted this position so that I could further my work in teacher leadership. The superintendent and principals supported my vision of a DILI that included the building and district administrators at each monthly training. Over the course of three years I have planned and facilitated monthly professional learning sessions in consultation with Dr. Ellie Drago-Severson—who facilitated two full day sessions each year, herself.

I recognize the complexity my dual role has presented in this study. I have taken significant measures – which I outline in full detail in Chapter III – to mitigate this potential validity threat, including using an outside researcher to interview participants. In the end, I believe that my familiarity with the challenges of teaching, and my experience as a coach and administrator, has benefitted my work as a researcher. My wholehearted purpose with this study has come from my unwavering belief that in order to best support our students, we must support our teachers, and let their voices influence teacher preparation, professional development, leadership practices, and national policies.

**Developmentally Intentional Leadership Institute (DILI)**

The DILI was a longitudinal developmentally intentional form of professional learning designed to grow leadership capacity in a cohort of 13 informal teacher leaders. The cohort of participants – which included both teacher leaders and administrators – met monthly for three years. Most meetings lasted for three hours, and I led them myself. Twice each year, the cohort met for a full day session with Dr. Ellie Drago-Severson. Over the course of three years, this came to 90 hours of professional learning experiences.

During this time, participants learned about principles of Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) and engaged in developmentally intentional
activities aimed at growing their capacities and supporting their ability to manage the complexities of leadership. For example, participants learned about the importance of understanding their own and others’ way of knowing. They learned about the power of and need for differentiating supports and challenges when working on a team (or when coaching other adults) in order to attend to developmental diversity. That is, they learned how to support others by employing the Pillar Practices of teaming, assuming leadership roles, mentoring, and engaging in collegial inquiry (Drago-Severson, 2004a, 2009, 2012a, 2016a).

The longitudinal (i.e., three-year) approach and the structure of working in a cohort were designed to serve as a holding environment, so that participants would feel supported as they took risks, engaged in critical conversations, discussed their challenges, reflected on their assumptions, and worked together to practice informal leadership. This DILI incorporated best practices in professional development, including being job embedded, providing ample opportunities for collaboration, reflection, coaching support, and the fact that principals and teachers co-participated in professional learning together (Darling-Hammond et al., 2017).

The goal of the DILI was to support informal teacher leaders in developing their own capacities to assume the responsibilities of leadership while also learning practical ways to support other adults in their leadership practice whether that be by leading their teams, facilitating professional development, or collaborating with others.

**Methodological Overview**

In this section, I provide an overview of the methodology I chose for my research. My primary focus was to learn from 13 informal teacher leaders’ who completed the institute about their experience in a three-year DILI. I wanted to understand how, if at all, their leadership transferred beyond the DILI. In addition to interviews with the 13 teacher leaders who completed
the DILI I conducted additional interviews with three building principals and three district administrators who participated in the DILI alongside the teachers. I also conducted interviews with the three teachers who started – but did not complete – the DILI, as I believed their perspective would provide valuable insight. In this section, I describe my rationale for a qualitative design and a case study approach to answer my research questions. A full description of my study, and the intentionality behind my design decisions appears in Chapter III.

**Rationale for Qualitative Design**

I used a qualitative methodology because the goal of qualitative research is to understand the meaning, context, and process of participants’ experiences (Creswell, 2014; Maxwell, 2013). More specifically, a qualitative approach can lead to an understanding of the context, and how meaning may be shaped by unique circumstances, providing an overall understanding of the process of participants’ experiences (Maxwell, 2013) – precisely what I intended to with this project. I selected an exploratory case study method for this qualitative research approach because my purpose was to bring out the various viewpoints and perspectives of participants using multiple sources of data (Yin, 2014). In this case, that meant the interviews with the 13 DILI completers, in addition to interviews with their supervisors and cohort mates who did not complete the DILI.

**Selection of Site**

In this section, I provide an overview of my three criteria for site selection and my method of participant selection. The selection was practically, theoretically, and conceptually driven as I sought to study a long-term developmental approach to support informal teacher leaders.
My first selection criterion was to select a school district with a multi-year, sustained, leadership development program for teachers based on a Learning-Oriented Leadership model. This model of professional learning had to incorporate best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015), and developmentally intentional components (Drago-Severson, 2004a, 2009, 2012a, 2016a, 2018c), including a district supported job-embedded experience (Every Student Succeeds Act, 2015; Kraft et al., 2018).

My second selection criterion was that the program had to include both teachers and administrators. This was important to me because calls in the literature cite a need for administrators to participate in teacher leader training (Bryant 2017; Kerr, 2015; Phillips, 2018; Snoek & Volman, 2014; Stand, 2018; Weiner & Lamb, 2020; Wenner & Campbell, 2017).

My third criterion was that the institute had to take place in a small school district. This was important, as smaller districts tend to not have the same amount of administrative support (e.g., coaches, department chairs, or vice principals) as larger districts (Niederberger & Polke, 2014). This was also personally important to me, as I have spent the administrator part of my career in small school districts, giving me better insight and understanding of the particular dynamics and pressures of such districts.

The only district I could identify that provided sustained leadership development for potential teacher leaders based on a Learning-Oriented Leadership model and included administrators was the MELC (a pseudonym) school district, where I work as a curriculum supervisor. It is important to note that I did try to secure a different research site with two other districts, but one did not meet the criterion of administrator participation and the other did not opt to host a DILI and therefore did not meet the site selection criteria. As mentioned in above in
the “My Relationship to the Research” section below (and in Chapters II and III), I designed the institute based on my coursework with Dr. Drago-Severson. I also served as the lead facilitator of the MELC DILI.

**Selection of Site and Participants**

I employed a purposive sampling strategy, as I deliberately chose participants who were selected based on their experience relative to the phenomena of interest (Palys, 2008). Each of the 13 teachers and six administrators who participated in three full years of the DILI, as well as three teachers who partially completed the DILI, participated in my interview study. This made for a total of 22 participants.

My selection criterion for the survey was similarly simple: I included the entire the teaching staff in the MELC school district.

**Data Collection**

Maxwell (2013) notes that the goal of qualitative research is to understand the meaning, context, and process of participants’ experiences. Therefore, my data collection included a six-question district-wide (i.e., of the entire professional teaching staff) survey that sought to understand the specific context of the study (Creswell, 2014). This was to provide insight to address my third research question, as I aimed to understand the challenges teachers face in this research site. I then utilized semi-structured interviews to explore a deeper understanding of institute participants’ experience (Bloomberg & Volpe, 2008; Rubin & Rubin, 2005).

Throughout data collection I was able to learn how the teachers described their learning and how it influenced their leadership practice (i.e., my first three research questions).
Survey

My first step in the data collection process (i.e., before the interviews that were the primary source of data for my study) was to administer a survey to 90 teachers in the MELC school district. With this survey (Appendix A) I addressed my third research question – as I wanted to understand what difficulties the larger group of all teachers in the district named, and how they reported managing those challenges. I also asked respondents to identify whether they participated in the DILI program. This allowed me to compare the survey answers of the DILI teachers with those of the non-DILI teachers. These results showed some discrepancies and some similarities between the two sets of participants.

Interviews

The primary focus of the study was on 13 teacher leaders who completed the full DILI program. They each participated in two one-hour interviews (which addressed my first and second research questions). I conducted additional interviews with the other members of the DILI cohort. A single round of 60-minute interviews with the three teachers who did not complete the DILI helped to address my second research question. A single round of 90-minute interviews with the administrators helped to answer my fourth research question. Thus, I was able to supplement—and even triangulate (Creswell, 2013; Maxwell, 2013)—the responses I got from the 13 program completers with the views of various colleagues and supervisors around them. All of the interviews were actually conducted by an outside interviewer (see below).

DILI Completer Interview #1

I organized the interview process (Appendix B) so that the first 60-minute teacher interviews took place after the completion of the third year of the DILI program. This first round of interviews was designed to answer my first and second research questions (i.e., about their
background, experience in the DILI, and the challenges and responsibilities they face as teacher leaders. What I learned from reviewing and analyzing transcripts from these interviews informed their second interviews, as the external interviewer shared some of my preliminary learnings to check interpretations with each person (Maxwell, 2013).

**DILI Completer Interview #2**

The second interviews were focused on my second research question and sought to understand how, if at all, participants transferred their learning to their practice as teacher leaders. The semi-structured interview protocol (Appendix C) allowed for follow up to address key findings and questions (Kvale, 2003). These interviews began with a summary of how I had interpreted what they shared in their first-round interviews. The interviewer engaged participants in member checks, in which they had the opportunity to confirm or otherwise respond to my interpretations (Creswell, 2012a; Maxwell, 2013). This was an important element of my being careful about interpretive and theoretical validity (see below).

**DILI Non-Completer Interview**

I believe that the three participants who opted not to complete the program provided valuable insight that helped me develop a stronger understanding of how to support teacher leadership. I learned about their experience in the DILI, the challenges they faced, and their rationale for not continuing in the DILI. (See Appendix D for the interview protocol.)

**Administrator Interviews**

The external interviewer conducted interviews with the building and district administrators to give them the opportunity to discuss their experience in the DILI. This provided insight into my fourth research question, as the administrators described how the DILI
influenced the teachers they supervised and explained the transfer of this work in their respective areas of supervision. These interview protocols were also semi-structured (Appendices E and F).

**Data Analysis**

In this section, I describe the methods I employed for data analysis. I used a systemic process with specific steps (Creswell, 2007; Maxwell, 2013). As I describe in greater detail in Chapter III, my data analysis included multiple steps.

2. Survey data analysis (Popeil, 2010).
3. Transcribing and reviewing interviews (Maxwell, 2013; Seidman, 2013).
4. Coding (Creswell, 2014; Maxwell, 2013; Miles et al., 2014).
5. Categorizing the data across themes (Miles et al., 2014).
6. Writing narrative summaries of participants (Maxwell, 2013; Seidman, 2013).
7. Using data displays, matrices, and tables to display analyzed themes (Maxwell, 2013; Miles et al., 2014; Seidman, 2013).

**Validity**

In this section, I describe how I attended to my biases and other potential validity threats in my study. I first describe my researcher bias and reactivity. I then describe how I addressed descriptive, interpretive, and theoretical validity. For a more complete description, see Chapter III, where each of these is explained in greater detail.

**Researcher Bias**

Researcher bias and subjectivity influence what a researcher studies, and how he or she interprets what they see (Maxwell, 2013). As mentioned above, my role in the MELC school
district (i.e., as an administrator and the leader of the DILI) represented a strong commitment to
learning how to support teacher leadership. This very commitment also presented a possible
validity threat (Maxwell, 2013). I understand that my own personal investment in this program,
the commitments I have as a person, and my beliefs about the value of Learning-Oriented
Leadership – however well grounded – all presented issues related to researcher bias in this
study. I was very careful to attended to this issue.

As the designer and facilitator of the DILI, having professional relationships with
participants, and being employed by the district could have biased my study. My belief that a
developmental approach and Learning-Oriented Leadership have the potential to support
leadership were also sources of potential bias. Therefore, I have took great precautions to ensure
I was constantly aware of my own biases, assumptions, and judgments. These precautions
included writing analytic memos, seeking discrepant data, and cross checking my findings with
fellow doctoral students in a research class at Teachers College, my external interviewer, and
repeatedly revisiting this issue with my sponsor and dissertation coach (Maxwell, 2013).

Reactivity

Maxwell (2013) describes reactivity as the influence of the researcher on the participants
of the study, and notes that it is critical for researchers to understand the influence their identity
and position can have on a study. As a qualitative researcher, I cannot remove my influence from
the study. Stated most simply, I have the power to influence the participants and what they were
willing to share in this study (Maxwell, 2013). Given my role as a supervisor in the district and
the lead facilitator of the program, I had to address reactivity.

First, I met with potential participants at a team meeting to introduce this research project
and my interest in learning from the participants’ authentic experience. I assured them that their
choice to participate or not would not influence any future evaluations, and that their sharing of negative feedback would be helpful to my learning more about how to best support teacher leaders. Second, I utilized an external researcher to conduct the interviews (Alm, 2017) so that they would not have me in front of them as they answered questions and discussed the DILI with the interviewer. Third the interview protocol also included questions that specifically sought to invite negative feedback from participants about their experiences in the DILI. Furthermore, the interviewer specifically asked participants whether their responses would differ if I (the program facilitator) were not connected to the research. This gave participants the opportunity to describe how, if at all, my role may have influenced their responses.

Descriptive Validity

Descriptive validity is the accuracy of what is recorded (and transcribed) as accurately representing what happened (Maxwell, 2013). In order to ensure that participants’ experiences and voices are correctly represented, all interviews were digitally recorded and transcribed verbatim (Creswell, 2012; Maxwell, 2013). I checked the transcripts against the interview recordings to ensure accuracy (Maxwell, 2013). Finally, I gave participants the opportunity to review their transcripts to check for accuracy (Creswell, 2007; Maxwell, 2013; Siedman, 2013).

Interpretive Validity

Interpretive validity is the accuracy of interpretation of participant viewpoints, thoughts, and experiences so that they are accurately understood (Johnson, 1997; Maxwell, 2013). In order to attend to this, I wrote narrative summaries and vignettes to create thick descriptions (Creswell, 2014). Second, I engaged in member checks with participants, during either the second interview or a follow up phone call (Maxwell, 2013). Third, I had other doctoral students with qualitative
training assist in coding, which allowed me to cross check my analysis with a group of fellow researchers and establish inter-rater reliability (Creswell, 2014; Maxwell, 2013; Siedman, 2013).

**Theoretical Validity**

Theoretical or methodological validity “Goes beyond concrete description and interpretation and explicitly addresses the theoretical constructions that the researcher brings to, or develops during the study” (Maxwell, 1993, p. 50). To attend to this, I looked for discrepant data in order to attend to my own biased subjectivity (Locke et al., 2014; Maxwell, 2013; Seidman, 2013). I also utilized a research class to share data with doctoral students and invited them to collectively code and interpret the data. This allowed me to bring out potential ideas that are outside of my presumptions, the literature, and addressed interpretive validity (Creswell, 2013; Maxwell, 2013).

**Limitations**

The first limitation of this qualitative study is that it relied on a small sample size and the findings are only generalizable only for this research site—i.e., internal generalizability (Maxwell, 2013). The second limitation is that the group of participants lacked racial diversity, as it is completely made up of Caucasian and predominately female participants. A more diverse group of participants could have revealed varying perspectives. The third limitation is that participants were asked to recall information and reflect on a three-year period of time. This is problematic because I depended on the ability of participants to remember events, experiences, and feelings from across three years. These limitations are a result of my narrowly defined selection criteria, as they resulted in only one school district to choose from. Therefore, I am not able to choose the sample size or racial diversity of participants. In a future study, I may seek out
participants with more ethnic and racial diversity. I may also interview participants before, during, and after their participation in a DILI.

**Overview of Findings**

Through interviews with three groups of participants (i.e., 13 teachers who completed the three year DILI, three non-completers who only participated in the DILI for one or two years, and six administrators who participated alongside their teachers) I discovered three large findings, each of which I refer to as a cluster since each has multiple dimensions. These findings were further substantiated by a district wide survey that compared the responses of the teachers who participated in the DILI and other teachers in the district who did not participate in the DILI.

- Finding Cluster 1: The DILI acted as a holding environment (i.e., provided support, challenge, and stayed in place).
- Finding Cluster 2: The DILI completers experienced perspective shifts regarding themselves and others, the utility of collaboration, and the way they defined leadership.
- Finding Cluster 3: The DILI completers transferred their learnings to assume acts of leadership.

I discuss these three clusters of findings at length in Chapters VI, VII, and VIII respectively. In sum, these findings did reveal that the DILI supported and challenged the teacher leaders who participated in the DILI to shift their perspective and assume new leadership responsibilities that made a difference for the district according to the teachers themselves, the administrators who directly supervised them, and a district wide survey.
Implications

In an effort to strengthen teaching excellence, states across the nation are recognizing teacher leadership with endorsements, licenses, and incentives to encourage teacher leadership (Diffey & Aragon, 2018). However, informal teacher leaders also need recognition and support. By understanding how to support informal teacher leaders, the findings can be extended to also support teacher leaders in formal roles. I hope that this qualitative study helps with further understanding of the teachers’ perspective on what is challenging, and supportive for teacher leaders. And, I also hope that my findings inform policymakers, school districts, and higher education as they continue to develop licenses, endorsements, policies, and university preparation programs aimed towards supporting teacher leaders.

Chapter Summary

In this chapter I presented the overarching research design for this qualitative study with a case study approach. I introduced the problem and the research questions that guided this study. I also provided an overview of the literature that served as the foundation for this study as well as an overview of the findings. In Chapters II and III, I provide a more detailed description of both the literature and the methodology that informed this study. Next, in Chapter II, I more fully describe the literature and theories that this study is built upon.
CHAPTER II: LITERATURE REVIEW

In this chapter, I explain the literature that informed the conceptual framework for my dissertation study that sought to understand the experiences of 13 teacher leaders in a three-year developmentally intentional model of professional learning. First, I describe how 20 years of national policies aimed at increasing student achievement created a pressing need for teacher leaders. I then introduce adaptive leadership theory to explain the challenges of teacher leadership (Heifetz, 1994; Heifetz & Linsky, 2017). Next, I describe the benefits of teacher leadership as well as the barriers that teacher leaders face. I then review current models of teacher leader preparation, including a review of the literature on best practices of professional development. Following, I introduce a model of leadership, termed Learning-Oriented Leadership (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a), as a way to professionally develop and support teacher leaders. Finally, I describe my research site, and its unique three-year DILI that incorporates the aforementioned bodies of literature.

The purpose of my study was to explore the experiences of 13 teachers who enrolled in a three-year developmentally intentional leadership institute (DILI) and to learn how, if at all, that institute helped them develop and apply leadership skills. In order to complete this study, I focused on four research questions.

1. How do 13 teacher leaders who took part in a developmentally intentional leadership institute (DILI) describe and understand the leadership responsibilities they assumed if any? What challenges, if any, do they report facing as they developed their leadership practice?
2. How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities?

3. What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their most significant work-related challenges, both in general and particularly around managing workload, collaboration, and teaming?

4. How do six school and district administrators (who directly supervise the teacher participants) describe and understand the influence of the three-year DILI on the formal and informal leadership practices of the teacher participants?

Next I describe the research and theory that informed my study including: (1) adaptive Leadership Theory (Heifetz, 1994; Heifetz & Linsky, 2017); (2) teacher leadership, including models of leadership preparation; (3) best Practices in Professional Development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015), (4) Drago-Severson’s Learning-Oriented model of school leadership (2004a, 2007, 2009, 2012a, 2016a); and (5) an overview of the DILI curriculum and the school district that is the focus of this study. I then synthesize these bodies of literature and highlight how they can be interwoven to support teacher leadership. Figure 1 is presented again (below) because it depicts this synthesis and the relationship among and between the bodies of literature (i.e., adaptive leadership theory, theories of teacher leadership, best practices in professional development, and Learning-Oriented Leadership).
Approach to the Literature

To conduct my literature review, I began with readings from classes, books, and journal articles from authors whose work related to my study’s purpose and research questions. I then
used Google Scholar and search engines from the Teachers College Library (Columbia University) to conduct searches of the literature. I was able to use key words (e.g., “Learning-Oriented Leadership,” “adaptive leadership theory,” “professional development,” and “constructive-developmental theory”) to conduct a comprehensive search of relevant publications to inform my study. However, when I tried to search the term “teacher leadership,” I found an excess of publications. For instance, according to the Dimensions Search Engine, there were 42,010 “teacher leadership” publications in 2018. This was a significant increase from the 23,324 studies published in 2010. Therefore, I relied on two literature reviews that encompassed teacher leadership studies from 2004-2015 (York-Barr & Duke, 2004; Wenner & Campbell, 2017). I narrowed my search by adjusting the dates to reflect publications on teacher leadership from 2015-2019, which produced 9,520 results. To further narrow these results, I utilized the terms “teacher leadership preparation,” “teacher leadership programs,” and “teacher leadership institutes.”

Following my dissertation proposal, I set up a Google Scholar alert to notify me of any new publications in 2020. I reviewed new works throughout the writing process of my dissertation and incorporated the most up to date literature that I could find.

**Defining “Teacher Leadership”**

In this study, I use Wenner and Campbell’s (2017) definition of teacher leadership, “Teacher leaders are teachers who maintain a K-12 classroom-based teaching role, while also taking on the responsibility of influencing their peers” (p. 140). That is, *these teachers’ primary responsibility remains serving as classroom teachers*. Teacher leaders can differ from formally established roles such as principals, directors of curriculum, or pupil services directors. According to Troen and Boles (2012):
Teachers become leaders in their schools by being respected by their peers, being continuous learners, being approachable and using skills and influences to improve the educational practice of their peers. They model effective practices, exercise their influence in formal and informal contexts and support collaborative team structures within their school. They work in collaboration with principals and other administrators by facilitating improvements in instruction and promoting practices among their peers that produce improved student learning outcomes (p. 30).

I used Wenner and Campbell’s definition because it clearly identifies a teacher leader as a peer without a formal role and title, and therefore includes a larger number of teacher leaders. Other definitions of teacher leadership often point to more formal roles, such as coaches, department chairs, and professional developers (Kanarek, 2020; Smylie & Eckert, 2018). However, informal teacher leaders reflect recent waves of thinking about teacher leadership, and therefore merit recognition and support. Furthermore, by researching how to support informal teacher leaders, my findings may also be applicable to teacher leaders in those formal roles.

**National Context: A Review of Twenty Years of National Policies**

In this section, I briefly review three significant national policies and explain how they shifted the K-12 educational landscape and altered models of school leadership to create a pressing need for teacher leaders.

The 21st century brought forth unprecedented rates of change, and schools were tasked with preparing students for these changes – including a more global and diverse world. In order to prepare students for jobs and technology not yet created, governments around the world have raised expectations (Stewart, 2018). For example, international and national level standardized tests have been used to measure student, teacher, and school performance. The accountability and rigor of these assessments has increased (Ado, 2016). International comparisons of industrialized nations have been based on the Trends in International Mathematics and Science
Study (TIMSS) since 1995, and based on the Programme for International Student Assessment (PISA) assessment since 2000. Perceptions of American students’ underperformance (when compared globally) have resulted in mounting pressure for national improvement (Duval, 2017). Thus, by the end of the 20th century, there was tremendous pressure for greater accountability for schools across the United States (Ado, 2016). 2001’s No Child Left Behind (NCLB), 2010’s Race to the Top (RTTT), and 2015’s Every Student Succeeds Act (ESSA) heightened expectations, purportedly making schools accountable for student achievement (as measured by the results of high stakes standardized tests) and pushed states to adopt new college and career ready standards (DeMonte, 2013; Horsford et al., 2019).

In 2001, President George W. Bush signed the No Child Left Behind Act (NCLB), expanding the federal role in education and requiring states to measure student progress in reading and mathematics. For the first time in history, schools were newly held accountable for the progress of all students, as measured by high stakes tests that disaggregated student results by race and other factors (Horsford et al., 2019). This shed light on often under-examined subgroups [e.g., racial minorities, English language learners otherwise known as students with Limited English Proficiency (LEP), and students from low socioeconomic status families] and raised expectations for every subgroup – pushing schools and students to meet every need in their classrooms so all students made academic gains (Wagner et al., 2006).

In 2010 – in the midst of the Great Recession’s cuts to school funding – President Barack Obama introduced Race to the Top, a competitive federal grant program that invited states to compete for additional federal funding. In order to qualify for aid, states were encouraged to adopt numerous policies that focused on “high-stakes testing and accountability, which included the adoption of standards and assessments that contribute to college and career readiness and
global competitiveness” (Horsford et al., 2019, p. 75). The National Governors Association and the Council of Chief State School Officers developed the Common Core State Standards (CCSS) to support improved instruction that might better prepare students with the skills needed in the 21st century. Following their publication in mid-2010, CCSS was quickly adopted by 45 states and the District of Columbia (Achieve, 2017; Horsford et al., 2019). In comparison to previous state standards, these new standards were more rigorous, and consequently created a pressing need for improved instruction and a change in the professional practice of teachers (Achieve, 2017; DeMonte, 2013; Wilhoit, 2012).

In 2015, the Every Student Succeeds Act introduced the most recent major shift in national education policy. This legislation shifted accountability from the federal to the state level (Horsford et al., 2019). States had more freedom to create their own standards. As public criticism for the CCSS continued to mount, many states changed the name of their newly adopted standards. However, the standards almost entirely reflected the same substance and intent of the Common Core State Standards (Achieve, 2017). Thus, continuing an era of increased accountability and raised expectations for learning, achievement, and instruction.

These three major federal initiatives altered the pressures on individual schools and the educators that work within them. They changed expectations about student, teacher, school, and district performance – which increased pressure on educators and created a greater need for teacher leadership (Darling-Hammond & Richardson, 2009; Stewart, 2018; Szeto & Cheng, 2018; Weiner & Lamb, 2020). National policies that introduced new expectations and new measures of accountability demanded reform of longstanding school cultures. Together, these changes created a pressing need for teacher leaders to help meet new and complex demands. My study is a response to these changes because it describes the challenges facing schools in more
detail and the rationale for teachers to assume leadership roles as a way to partner with school leaders in meeting these demands. It also highlights the demands being placed on teacher leaders as they are asked to address these challenges not just in their classrooms but also as teachers in leadership roles.

The first body of literature that informed my study is adaptive leadership theory, which categorizes the challenges of education today especially for teacher leaders.

**Adaptive Leadership Theory**

Today’s schools are complex and filled with a myriad of challenges. Understanding a problem is sometimes the difficult first step towards finding a solution, as not all problems facing educators today are the same. Adaptive leadership theory can be a helpful lens when categorizing and understanding dilemmas in education (Wagner et al., 2006). “Adaptive leadership is the practice of mobilizing people to tackle challenges and thrive and to flourish in new ways and in more challenging environments. Adaptive leadership supports the change that enables the capacity to thrive” (Heifetz et al., 2009, p. 14). Adaptive leadership theory categorizes the dilemmas facing schools today as adaptive, technical, or mixed challenges (Heifetz, 1994; Heifetz & Linsky, 2017; Linsky & Lawrence, 2011).

**Technical Challenges**

According to Heifetz (1994), many challenges encountered by educators in schools are *technical* challenges. These are dilemmas with known solutions. They may require new learning and may not necessarily be easy, but a solution is available. Both the problem and the resolution can be readily identified. For example, if school data reveal that students are underperforming in math, a school can adopt a research-based math program and train teachers in implementing a
new curriculum program. Other examples of technical challenges include managing a school budget, learning techniques for classroom management, or dealing with facility maintenance.

**Adaptive Challenges**

An adaptive challenge is one for which no known solution exists, and the root of the problem is difficult to identify. For example, addressing the opportunity gap (Drago-Severson & Blum-DeStefano, 2018d), reshaping schools to educate an increasing number of English Language Learners or students with Limited English Proficiency (Benis Scheier-Dolberg, 2014), and in – relation to my study – responding to the demands created by policies such as the *No Child Left Behind Act* (Wagner et al., 2006) and *Every Student Succeeds Act* are all adaptive challenges. One thing that they all have in common is that they each call for a restructuring of the cultural norms of schools.

As noted by Darling-Hammond et al. (2017), “Sophisticated forms of teaching are needed to develop 21st century student competencies, such as deep mastery of challenging content, critical thinking, complex problem solving, effective communication, collaboration, and self-direction” (p. 1). In this century, the teaching profession has had to shift from working in isolation to being more collaborative (Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Gray & Ward, 2019; Jefferson & Anderson, 2017; Linsky & Lawrence, 2011; Markow & Pieters, 2010; Ronfeldt et al., 2015; Wagner et al., 2006). For example, teachers have also had to learn new pedagogical skills that integrate literacy into content areas to prepare all students for college and career readiness standards (Santos et al., 2012). This, in turn, has required new models of collaboration and learning in schools – with teacher leaders playing a critical role in facilitating this change (Darling-Hammond & Richardson, 2009; DeMonte, 2013; Ronfeldt et al., 2015; Santos et al., 2012; Wagner et al., 2006). Again, this change in culture includes an
individual and collective shift in mindset and is required to meet adaptive and mixed challenges in schools (Heifetz, 2004). However, this shift in culture is a tremendously challenging undertaking and explains the barrier of egalitarian norms that teacher leaders report as obstacles to their leadership.

**Mixed Challenges**

A mixed challenge has a clear problem, but the solution is nonetheless unknown. Like an adaptive challenge, finding solutions requires new learning and collaboration (Heifetz & Linsky, 2017; Heifetz et al., 2009). For example, recent models of school leadership have pointed out that leadership is too complex for a single person and have called for teachers to take up some of the mantel of leadership (Boyce & Bowers, 2018). This presents additional complexities. Specifically, how schools shift their cultural norms to support collaboration, shared decision making, and shared responsibility between administrators and teachers (Drago-Severson, 2016a, 2018, Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Linsky & Lawrence, 2011; Wagner et al., 2006). While there are a plethora of books and programs that teachers can turn to in order to learn about leadership, my study has been grounded in the mixed challenge of leading cultural transformation in schools to accept teacher leadership and collaboration as a new normal in school culture (Drago-Severson, 2016a; Drago-Severson & Blum-DeStefano, 2018b, 2020; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Markow & Pieters, 2010; Ronfeldt et al., 2015). This also begs the question how can teacher leaders support a shift in school culture to be more collaborative so that a school as a whole can better address the mixed and adaptive challenges of education through models of shared leadership?
Adaptive Leadership Theory Summary

Addressing adaptive and mixed challenges in our schools requires three things (Heifetz 1994; Heifetz et al., 2009; Heifetz & Linsky, 2017; Wagner et al., 2006):

2. Shifts in the cultural norms of schools.
3. A collaborative approach in which all stakeholders work together to form new knowledge and understanding.

The need for new learning and collaboration has shifted the organizational structure of schools to include models of shared leadership in which teachers lead and learn beside school administrators (Boyce & Bowers, 2018). My study examined a developmentally intentional leadership institute (DILI) that sought to prepare teacher leaders to better manage the adaptive and mixed challenges that schools face. Therefore, adaptive leadership theory was one of the principle lenses that has informed work, and my first research question in particular (i.e., regarding the challenges that participants report facing). As the curriculum of the DILI included adaptive leadership theory, this also informed the way participants described the challenges they faced, with some even using this language in their discussions.

Teacher Leadership

The second body of literature that informed my study is teacher leadership. In this section, I describe how education leadership literature has evolved to call for teachers to take an active role in leading schools, and in response four waves of teacher leadership emerged. I then describe the current wave of teacher leadership in more detail by outlining the responsibilities, benefits, and barriers of teacher leadership in accordance with the literature.
A Review of Education Leadership & Implications for Teacher Leaders

Historically, early conceptions of educational leadership tended to focus exclusively on principals and other formal school administrators (Edmonds, 1979; Halinger & Murphy, 1985). Starting in the 1990s, a conceptual shift introduced various models of shared and instructional leadership, calling on teachers to partner with building- and district-administrators to lead schools (Boyce & Bowers, 2018; Murphy et al., 2007; Ogawa & Bossert, 1995; Prestine & Bowen, 1993). This theoretical shift included shared instructional leadership (Marks & Printy, 2003) and leadership for learning (Boyce & Bowers, 2018; Hitt & Tucker, 2016; Murphy et al., 2007). As school leaders faced surging complexities, conceptions of leadership transformed to include formal and informal roles across a school, and the concept of teacher leadership was born (Boyce & Bowers, 2017, 2018). Consequently, conceptions of leadership evolved to include every person in a school who performed a leadership role, rather than just those with formal titles (Ogawa & Bossert, 1995; Prestine & Bowen, 1993). These advances in educational leadership theories recognized that effective school leadership requires supporting the growth and development of all types of leaders, including teacher leaders (Boyce & Bowers, 2018).

History of Thinking About Teacher Leadership

There have been four waves of teacher leadership thinking (Levin & Schrum, 2017; Saunders, 2018). In the first wave, only those in traditional formal roles (e.g., grade-level and department chairs) were recognized as teacher leaders. In the second wave, new formal positions (e.g., curriculum coach, lead teacher) – positions that often took teachers out of the classroom – were recognized as teacher leadership roles. In the third wave, teacher leadership was broadened to include teachers serving as mentors and advisors – including both those in formal and informal capacities. The fourth (and current wave) of thinking about teacher leadership still
includes formal and assigned leadership roles (including grade level chairs or coaches), as well as many informal roles. These informal leadership roles include sharing classroom practices, mentoring, modeling lessons, and leading professional development. This fourth wave points to those who act as forces of school culture – either to maintain or to change it – as teacher leaders.

My study is built on this fourth wave of teacher leadership. As Wenner and Campbell (2017) reported, “Teacher leadership, while rarely defined, focused on roles beyond the classroom, supporting the professional learning of peers, influencing policy/decision making, and ultimately targeting student learning” (p. 1). This broader definition underlies the many barriers and challenges that I think are most significant in the literature and is therefore especially important to my third research question (i.e., regarding work-related challenges). This view of teacher leadership is central to understanding how principals and district administrators describe the teacher leaders whom they supervise in their interviews (i.e., my fourth research question).

**Responsibilities of Teacher Leaders**

Teacher leaders have taken up a broad variety of responsibilities. Wenner and Campbell’s (2017) literature review reveals that teacher leaders have been responsible for extending their leadership beyond their classroom walls, supporting professional learning, participating in decision making, and collaborating with administrators to work toward improvement and change for the whole school. Examples of this work include teacher leaders conducting professional development, facilitating team meetings, collaborating with administrators on building and district goals, modeling lessons in their own and in other teachers’ classrooms, leading data meetings, providing peer feedback, sharing pedagogical approaches with colleagues, and formally and informally mentoring and supporting other teachers. Others have found that,
ultimately, teacher leaders help raise the caliber of the school by increasing collaboration, sharing best practices, encouraging professional learning, and offering assistance to other teachers (Curtis, 2013; Muijs & Harris, 2006; Sparks, 2020; Weiner & Lamb, 2020).

When teachers assume leadership roles and help facilitate collaboration and instructional leadership, it has far reaching benefits for the teachers themselves, the students, and the school as a whole (Wenner & Campbell, 2017; York-Barr & Duke, 2004). My first research question included understanding the responsibilities that the teacher leaders who participated in this study took up. In Chapter VIII, I describe in greater detail the leadership roles they said that they assumed. This was corroborated by the administrators, who spoke of how the teachers’ acts of leadership influenced the school and district as a whole.

Benefits of Teacher Leadership

The implementation of teacher leadership has been shown to be beneficial for teachers and schools – including increasing student achievement (Ingersoll et al., 2017). Troen and Boles (2012) reported, “School leaders who create opportunities for leadership in their schools are more successful in achieving goals of improved student learning” (p. 25). In their reviews of the literature, both York-Barr and Duke (2004) and Wenner and Campbell (2017) revealed that teacher leadership is beneficial to teachers, with teacher leaders reporting greater feelings of empowerment, confidence, and satisfaction. In a 2016 survey of nationally recognized Teachers of the Year, participants self-reported that assuming leadership as a teacher improved their leadership skills, organizational, and instructional practices (Jacques et al., 2016). A case study of teacher leaders in Maine revealed a positive correlation between teacher leaders’ pedagogical knowledge and skills, and efficacy as leaders (Fairman & Mackenzie, 2012). Additionally, teachers who engage in leadership are associated with higher levels of retention and report
greater job satisfaction (Harris & Muijs, 2003; Natale et al., 2013; Wixom, 2016). With 47% of teachers citing dissatisfaction as their reason for leaving the profession within the first five years, greater job satisfaction is a significant benefit to teachers, schools, and education as a whole (Podolosky et al., 2016; Saunders, 2018; Sutcher et al., 2016; Wixom, 2016).

Teacher leadership also has a positive impact on schools. Teacher leaders often have closer relationships with other teachers, allowing for more naturally occurring and informal collaboration. In this way, teacher leader relationships can be more influential than those of administrators and other formal leaders (Spillane, 2006). As Friedman (2011) posits, teacher leaders maintain high standards and serve as role models.

Teacher leadership has a positive impact on student achievement. The benefits of teachers working together to positively influence student achievement (i.e., collective efficacy) are far reaching (Donohoo, 2018; Harris & Jones, 2019). Ronfeldt et al. (2015) conducted a quantitative survey study of 10,000 teachers in Miami-Dade (Florida) and sought to understand if collaboration was associated with student achievement. Their findings revealed that teachers improve their practice more rapidly when working in schools with better collaboration (Ronfeldt et al., 2015). When teachers share their perspectives, opinions, and experience with each other, it positively impacts student achievement by raising levels of instruction and making strides towards social equity (Muijs & Harris, 2006; Neumeriski, 2012). However, a culture of collaboration is often dependent on teacher leaders (Ronfeldt et al., 2015). A 2010 study conducted over six years by the Wallace Foundation, sought to identify leadership and workplace conditions that improve teaching quality and student achievement. A collection of interviews from educational agencies, district leaders, a survey of teachers and administrators as well as classroom observations, and a review of student test scores resulted in a sample of almost 9,000
participants which revealed that higher student achievement is correlated with models of school leadership that is instructionally focused and shared, with input from all stakeholders, including teacher leaders (Louis et al., 2010). Ingersoll et al.’s (2017) statistical and multiple regression analyses of the nationally conducted Teaching, Empowering, Leading and Learning Survey (n = 1,000,000 teachers in 25,000 schools) compared survey results and student data to understand the relationship between teacher leadership, instructional leadership and student achievement. Their findings show that schools with the highest levels of instructional and teacher leadership rank at least 10 percentile points higher in both math and English Language Arts on state tests, compared to schools with the lowest levels – even after controlling for factors like school poverty, size, and location. Thus, suggesting that supporting teacher leadership results in positive benefits for the teachers, students, and the school as a whole. As I analyzed the data from my study, I searched for confirming or disconfirming reports of these themes. For example, I saw that a majority of the teachers in my study reported feeling better equipped to manage the challenges of teaching and leading and actually reported reduced stress (see Chapter VIII).

Teacher Leadership Standards and Leadership Competencies

In 2011, the Teacher Leadership Exploratory Consortium released the Teacher Leader Model Standards to provide guidelines to define and support teacher leadership (Berg et al., 2019). As of October 2018, 17 states had adopted teacher leader standards. Six states adopted the Teacher Leader Model Standards developed by the consortium, nine states created their own standards (with similar domains), and two states adopted modified version of these standards (Aragon, 2018). In addition, at least 20 other countries have also adopted these standards (Mieliwocki & Fatheree, 2019). The standards include seven domains of teacher leadership as highlighted below:
1. Fostering a collaborative culture.
2. Accessing and using research.
3. Promoting professional learning.
4. Facilitating instructional improvement.
5. Promoting use of assessment and data.
6. Improving outreach to families and community.
7. Advocating for students and the profession.

In 2014, another consortium (i.e., the National Education Association, the Center for Teaching Quality and National Board for Professional Teaching Standards) built upon The Teacher Leader Model Standards with The Teacher Leadership Competencies. The competencies suggest that teachers can become leaders by exploring pathways in instructional, policy, and/or association leadership. They are built of eight overarching competencies across a four-level scale (i.e., emerging, developing, performing, and transforming).

1. Reflective Practice.
2. Personal Effectiveness.
3. Interpersonal Effectiveness.
5. Continuing Learning and Education.
7. Adult Learning.
8. Technological Facility.
These standards and competencies informed my interview protocol as I specifically asked about teachers’ experiences with regard to assumed responsibility, collaboration, communication, adult learning, and professional learning. These standards also informed my analysis. That is, when I analyzed my data to understand the leadership responsibilities that both teachers (RQ #1) and administrators (RQ #4) reported that the teacher leaders took up, these frameworks helped me place the DILI learnings (RQ #2) into a broader understanding of teacher leadership competencies. Thus, I was better able to recognize the varying degrees of leadership roles that were assumed by the participants in this study.

**Barriers to Teacher Leadership**

As evidence of the value of teacher leadership continues to mount, there are also barriers that limit teacher leadership. The first problem stems from confusion around the meaning of teacher leadership. Wenner and Campbell (2017) revealed three more problems: potential issues with school principals, managing an increased workload, and old egalitarian norms. The works of Drago-Severson suggest a fifth significant barrier: a potential mismatch of developmental demand and developmental capacity (Drago-Severson, 2009, 2012a, 2016b; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, O’Connor, & Blum-DeStefano, 2018).

**Accountability Without Clarity**

The first barrier to fostering effective teacher leadership is the lack of a common understanding of the concept of teacher leadership, including the roles and responsibilities of teacher leaders (Neumeriski, 2012; Wenner & Campbell, 2017; York-Barr & Duke, 2004). According to Brosky (2012), “In the field of education, a struggle continues with the basic definition of teacher leadership. Many administrators, boards of education, parents, and even
teachers don’t recognize or understand teacher leadership” (p. 3). Administrators, teacher leaders themselves, and colleagues can be unclear about job expectations and responsibilities. Margolis and Huggins (2012) claimed, “Misunderstanding teacher leadership results in the misuse, underuse, and inefficient use of teacher leaders” (p. 968).

Despite the lack of a common understanding of the role of teacher leaders, teachers are often held accountable for leadership (Neumeriski, 2012; Supovitz, 2018; Weiner & Lamb, 2020). For example, in the Danielson evaluation model for teacher performance, teachers are scored on their ability to execute leadership (Danielson, 2014). Component 4d states:

Participating in the professional community that a distinguished teacher will [assume] leadership among the faculty. The teacher takes a leadership role in promoting a culture of professional inquiry. The teacher volunteers to participate in school events and district projects, making a substantial contribution and assuming a leadership role in at least one aspect of school or district life (p. 97).

Current standards, evaluation tools, and models of leadership call for teachers to lead, and hold them accountable for doing so, even though professionals in the field have a varied understanding of teacher leadership. When considering how to provide support for emerging teacher leaders, it is important to consider the expectations they are held accountable for. My dissertation focused on the teachers’ description of the challenges of teacher leadership (RQ #3). In Chapter VI I discuss in detail how my data analysis revealed specific elements from the DILI that supported them in overcoming the challenges they described (RQ #2).

The Role of the Principal

A lack of support from a principal is a significant barrier to teacher leadership. The research on teacher leadership is explicit and clear: the support of the principal matters (Bryant, 2017; Coughlin, 2015; Forster, 2020; Love, 2019; Mason, 2016; Muijs & Harris, 2007; Szeto & Cheng, 2018; Silva et al., 2000; Sinha & Hanuscin, 2017; Taylor et al., 2011; Frick & Browne-
Ferrigno, 2016; Weiner & Lamb, 2020). When teacher leaders are aligned with their principals and have the appropriate resources, they are more likely to thrive (Cooper et al., 2016; Forster, 2020; Murphy, 2005; Weiner & Lamb, 2020; Wenner & Campbell, 2017; York-Barr & Duke, 2004).

In my review of the literature, I was able to find just one teacher leadership program that trained emerging teacher leaders alongside their administrators. Cooper et al. (2016) employed a case study methodology to examine a professional development program that the administrators co-facilitated with university faculty. The 4-year university-based teacher leader program served 28 high-poverty urban charter schools in a large Midwestern city. They used a purposeful sampling strategy to identify three sites where the teachers presented strong leadership capacity and the principals fully supported the teacher leaders with time and resources. The researchers found that when principals created opportunities and placed teacher leaders in the roles of mentor or professional learning leader, the teacher leaders were able to drive change. When principals were not supportive, the teacher leader’s efforts were minimized.

Weiner and Woulfin (2018) conducted a qualitative interview study of two urban schools located in the Northeast, where 16 teachers participated in a non-profit sponsored, series of three-day institute meetings over the course of two years. They investigated topics associated with leadership, such as race, how to structure team meetings, and how to analyze student data. The teacher leaders were selected by invitation from their principals to attend the teacher leader program and received their principal’s full support. Weiner and Woulfin’s findings revealed that upon completion of the program, teachers transferred their learnings to their practice as the teacher leaders led team meetings, advocated for students, engaged in problem solving, and coached their peers.
Others have also found that principals add value to change efforts and make improvement more likely to succeed. Silvia et al. (2000) found that teacher leaders who returned to their schools to advocate for change after attending a university-based teacher leadership program were not able to do so due to lack of support from their principals. Similarly, a survey of 337 teacher leaders from a master’s level program revealed that – while teachers reported feeling more confident as a result of their training – the lack of support from their principals and negative school culture limited the participants’ ability to demonstrate leadership (Coughlin, 2015). In their study of a university-based program for teacher leadership, Taylor et al. (2011) found that support of the principal is critical. Furthermore, findings in a qualitative study of a three-year leadership program for science teachers revealed that the teacher’s ability to practice leadership was inhibited when school administrators did not create environments that were conducive to their efforts (Sinah & Haufsin, 2017).

This research suggests that principals also need support in understanding teacher leadership and in creating a culture where teacher leaders can thrive (Weiner & Lamb, 2020). These ideas informed the design of my own program and similarly informed my site selection criteria. That is, I was only going to focus on a program that included administrators. This research about the importance of principals to teacher leadership led me to include them as (additional) participants in my study. Furthermore, as I worked through my data analysis, I paid close attention to mentions of administrator support, or the lack of support, both of which proved important to participants in my study.

School leaders (e.g., principals) are responsible for their school’s culture (Leithwood et al., 2010). School cultures that uphold traditional norms of seniority, egalitarianism, and working in isolation present barriers to teacher leaders’ ability to fulfill their roles effectively.
(Katzenmoyer & Moller, 2009; Weiner & Lamb, 2020). When school leaders support teacher leadership it makes all the difference (Forster, 2020; Murphy, 2005; Weiner & Lamb, 2020; Wenner & Campbell, 2017; White, 2020; York-Barr & Duke, 2004). Calkins et al. (2019) suggested that principals must socially engineer their schools to support their teacher leaders and provide clarity, public direction, and an invitation to lead. As teacher leadership becomes more prominent, emerging research suggests that principals might also need support in creating conditions that maximize the influence of teacher leaders (Love, 2019; Phillips, 2018, Weiner & Lamb, 2020).

Teacher leadership can present particular challenges to principals, which in turn can lead them to resist teacher leadership (Smith, 2018). A 2018 case study (from the perspective of principals) of Iowa’s teacher leadership initiative revealed that while principals were optimistic about the possibilities of teacher leadership, they also experienced personal concerns including jealousy, anxiety, isolation, and a lack of confidence in their own ability to support teacher leaders (Phillips, 2018). In response, scholars and advocates have called for principals to receive training in how to support teacher leadership (Bryant 2017; Kerr, 2015; Snoek & Volman, 2014; Stand, 2018; Weiner & Lamb, 2020). The DILI I studied has taken this barrier into account, as the teachers and administrators co-participated in teacher leadership training and both the teachers and administrators described that this was helpful in building their relationships, setting goals, and developing a common language. In my research I sought to explore the teacher and principals’ experience of learning together and working together in and beyond the DILI.

Increased Workload

Another barrier to teacher leadership is lack of time (Wenner & Campbell, 2017). Teacher leaders often maintain both their traditional teaching role and additional leadership roles
and must find ways to split their time between teaching and leadership responsibilities. Thus, teacher leadership requires additional work (e.g., creating substitute teaching plans to participate in meetings or facilitate professional development). Patterson and Manning’s 2010 interview study collected data from 100 teacher leaders in an online community forum, and revealed that navigating the multiple demands placed on teacher leaders (e.g., individual and team planning, testing, administrative requirements, collaboration with parents and their colleagues) was an obstacle to teacher leadership. Muijs and Harris’s 2006 case study of 10 schools in England where teacher leadership was considered *operational* revealed that teacher leaders reported lack of time to be a barrier to teacher leadership.

Managing an increased and varied workload is also a developmental demand (Drago-Severson, 2004a; Drago-Severson & Blum-DeStefano, 2014) and a teachers’ ability to effectively balance the workload presented by both the students in their classes and the leadership requirements of their peers’ merits developmental support to assist in developing an increased capacity to handle the complexity of managing multiple and competing commitments (Drago-Severson, 2009). A key aspect of this study was understanding the types of challenges teachers described, and how, if at all, their participation in a DILI helped them in facing these challenges (i.e., RQs #3 and #4). This barrier in the literature was particularly notable as I worked to understand and develop the last of my three *Transfer* findings, *reduced feelings of stress* (see Chapter VIII).

**Egalitarian Norms**

One of the biggest cultural shifts schools face in introducing teacher leadership is overcoming the egalitarian norms that exist in schools (Katzenmoyer & Moller, 2009; Wenner & Campbell, 2017; York-Barr & Duke, 2004). This refers to a traditional component of school
culture that views all teachers as not only equal in position and rank (often only separated by years of experience and college credit earned, just for the purposes of salary scales), but also in role, skill, and knowledge (Murphy, 2005). Egalitarianism was the most commonly reported barrier by teacher leaders in both York-Barr and Duke’s 2004 and Wenner and Campbell’s 2017 reviews. For example, an ethnographic interview study (Durias, 2010) of six teachers of color who participated in a teacher leader program for math teachers in a K-8 California school district revealed that teacher leaders found difficulty when they attempted to assume leadership. They were isolated for taking risks outside of their typical responsibilities and for sharing new learning with teachers. This was attributed to egalitarian norms. Other studies have also shown that a culture with egalitarianism prevents teacher leadership from moving forward (Friedman, 2011; Johnson & Donaldson, 2007; Sinha & Hanuscin, 2017; Weiner & Lamb, 2020).

In a case study of 20 teacher leaders, Taylor et al. (2011) noted that teachers reported egalitarianism as their greatest barrier. Friedman (2011) reported that teacher leaders found difficulty with managing their changing relationships with peers. Carver’s (2016) case study of 12 teachers who participated in a two-year mid-western leadership academy revealed that teachers were hesitant to self-identify as teacher leaders because they met resistance and felt isolated from both their colleagues and (sometimes) their administrators when they challenged the status quo or extended their authority beyond the classroom. Further, a case study of 16 teachers who participated in a Science, Technology, Engineering, the Arts, and Mathematics (STEAM) based leadership program in Maine also revealed that teachers were reluctant to see themselves as teacher leaders, as they did not want to hurt the relationships they had with colleagues (Fairman & Mackenzie, 2012).
This egalitarianism is not just an American phenomenon. Danielson (2006) noted that in Australia, they utilize the term *tall poppy syndrome* (i.e., when poppies grow too tall the flower is cut off so that they are the same height as the other poppies). Teacher leaders, *especially informal teacher leaders* directly challenge this idea of egalitarianism (Katzenmoyer & Moller, 2009). Bond (2011) and Carver (2016) note that the leadership skills necessary to counter traditional norms and overcome this culture of egalitarian norms are rarely addressed in professional development programs. Changing school cultures to not consist of egalitarian norms and to be more collaborative and involve teacher leadership would constitute a mixed challenge (Wagner et al., 2006). My dissertation focused on a developmentally intentional leadership institute that aimed to equip emerging teacher leaders with the tools and support necessary to address the mixed challenge of egalitarian norms that so often presents a barrier to teacher leadership. Throughout my analysis I paid close attention to the participants descriptions of resistance from their peers and difficulty with teacher leadership and utilized this theory in my analysis.

**Developmental Fit**

The final barrier to teacher leadership I found in the literature is developmental fit (Drago-Severson, 2004a, 2009, 2012a, 2016a, 2019). Teacher leaders are called to cultivate climates of collaboration, establish short- and long-term goals, build consensus, facilitate productive meetings and staff development sessions, and engage in effective communication (Bond, 2011; Curtis, 2013; Troen & Boles, 2012; Wenner & Campbell, 2017). Executing the standards and competencies expected of teacher leaders requires that teachers engage in difficult conversations, take a stand for what they believe in, collaborate, sustain obstacles, and make decisions that are not always popular (Drago-Severson, 2012a, 2016a; Drago-Severson,
O’Connor, & Blum-DeStefano, 2018; Kegan, 1994, 2000). All of these place developmental demands on potential teacher leaders – demands that may not be within their capacity to execute (Drago-Severson, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, O’Connor, & Blum-DeStefano, 2018). Asking teachers to meet the developmental demands of leadership presents a formidable challenge when it is beyond one’s capacity to do so (Drago-Severson, 2009, 2012a, 2016a, 2018b, 2019, 2020). Heifetz and Linsky (2017) noted that managing adaptive challenges often requires individual growth. Individuals may need to learn new ways-changing attitudes, values, and behaviors or people cannot make the adaptive leap necessary to succeed in a new environment.

This concept of developmental capacity and developmental fit are not just barriers that I considered in my study. Rather, they are part of my own lens, as someone who deeply believes in the importance of developmental intentionality and accounting for developmental diversity. When I asked participants about supports and challenges in their work and in the DILI, I was asking about the developmental appropriateness of those supports and challenges. Thus, developmental fit was not just key to the design of DILI (see Appendix G), but was also vital throughout every stage of this study.

**Barriers to Teacher Leadership Summary**

The barriers reported in the teacher leader literature include lack of administrative support, egalitarian norms, managing an increased workload, and even lack of clarity around the very definition of teacher leadership. These challenges suggest that teachers could benefit from developmental support to aid their ability to manage developmental demands. My study sought to understand how, if at all, a leadership institute – the DILI – that provides developmental support to both the teachers and principals simultaneously was able to help teacher leaders in
addressing these barriers. Understanding what the literature has laid out about the most common barriers was particularly important as I analyzed data in response to my first research question (i.e., understanding the challenges of teacher leadership for these participants).

**Teacher Leadership Professional Development**

Teacher leadership professional development takes many forms. For example, it includes university-based coursework, district-sponsored professional development, hybrid programs that combine both, and ongoing learning pursuits such as National Board candidacy (Hunzicker, 2011, 2018; Saunders, 2018, Wenner & Campbell, 2017; York-Barr & Duke, 2004). Recently, the Consortium for Policy Research in Education (Berg et al., 2019) reviewed 285 organizations, professional journals, conference programs, and online data on teacher leadership preparation and organized them into seven categories (i.e., credential programs, fellowship programs, award programs, teacher leader consultants, differentiated work programs, communities of practice, and professional advancement programs). Interestingly, over half (i.e., 150) of these programs were formal university-based credential programs. While approaches for developing teacher leadership are varied, there is a general consensus on best practices for professional development. These best practices have also yielded positive gains for teacher leadership development. While studies have shown that these practices have resulted in strong personal benefits for teacher leaders (e.g., in attitude and confidence), there is a shortage of empirical studies about teachers transferring their learning to their practice. In other words, there is a lack of research focusing on the application of learnings from professional development to their leadership practice and/or the subsequent influence of teacher leadership on the school as a whole (Wenner & Campbell, 2017). In this section, I review these best practices for professional
development and discuss how they can support transfer from teacher leadership professional development programs.

**Best Practices in Professional Development**

Scholars have found different elements that constitute best practices in professional development. Darling-Hammond et al. (2017) offer seven traits that make for “effective” (p. v) teacher professional development, namely content focus, active learning, collaboration, modeling, coaching, feedback and reflection, and a sustained duration. The federal government describes best practices in professional development in the 2015’s *Every Student Succeeds Act* (ESSA). It defined professional development:

> The term “professional development” can be described as activities that (a) are an integral part of school and local educational agency strategies for providing educators (including teachers, principals, other school leaders, specialized instructional support personnel) with the knowledge and skills necessary to enable students to succeed in a well-rounded education and to meet the challenging state academic standards; and (b) are sustained (not stand-alone, 1-day, or short term workshops), intensive, collaborative, job-embedded, data-driven, and classroom-focused (*Every Student Succeeds Act*, 2015).

Darling-Hammond et al. (2017) and ESSA agree that professional development should be sustained and collaborative. ESSA differs in that it introduces job-embedded, data-driven, and classroom focused components. A notable addition in the ESSA definition is a job-embedded component. Job-embedded professional development is meaningful because it incorporates “the context of the school” (Cogshell et al., 2012, p. 4). Other work has also noted the importance of job-embedded professional development (Darling-Hammond & McLaughlin, 1995; Zepeda, 2019). In the context of professional development for teacher leadership, a fourth best practice is the inclusion of administrators (Coughlin, 2015; Cooper et al., 2016; Weiner & Lamb, 2020).

Teachers need opportunities to learn the pedagogies required to teach 21st century competencies. Despite defining best practices in professional development in a national policy,
teachers do not always have access to consistent and well-designed professional development (Blank et al., 2007; Darling-Hammond & Richardson, 2009; Darling-Hammond et al., 2017; Hess, 2013). While there are numerous factors that contribute to high quality professional development, in my study I focused on these four principle factors. I briefly review the literature on a) job-embedded; b) collaborative; c) sustained; and d) inclusion of administrators, below.

**Job-Embedded Professional Development (JEPD)**

Embedding programs in the context of a district and even a school is a best practice for teacher leadership professional development. JEPD is, “Teacher learning grounded in day-to-day teaching practice and designed to enhance teachers’ content specific practices with the intent of supporting student learning” (Croft et al., 2010, p. 10). Croft et al. (2010) also note that the U.S. Department of Education explains its support for JEPD in the National Archives and Records Administration (2009), “High quality, job-embedded professional development in a school is tied to improving instruction because it connotes a direct connection between a teacher’s work and the professional development the teacher receives” (p. 58479). JEPD may include teachers working together to analyze data, setting their own professional growth goals, and engaging in study groups (Croft et al., 2010; DeMonte, 2013; Drago-Severson, Roy, & von Frank, 2015).

Job-embedded teacher leader professional development is of particular importance to support transfer—meaning the application of teacher’s learnings from professional development programs to their work. In fact, studies reveal that participants of university programs – which are *not* job-embedded – struggle with transferring their learnings (Ado, 2016; Silva et al., 2000; Snoek & Volman, 2014). For example, a case study of 77 pre-service teachers who participated in coursework aimed at developing necessary skills for teacher leadership revealed gains in foundational skills and knowledge *without* additional ability to take leadership actions (Ado,
2016). Snoek and Volman (2014) employed a descriptive research design to interview the graduates from a two-year teacher leader university-based Master’s program in Amsterdam in order to understand the impact of the Master’s program on the teachers’ leadership practice and how they transferred their learnings to their schools. Their findings from interviews with 14 of 17 participants and their respective supervisors revealed that the teacher leaders were not able to transfer their learnings to their schools. Recognition of the importance of teachers transferring their learnings to their schools has led to recent calls for teacher leadership programs to include more job-embedded components (Hunzicker, 2018).

**Administrator Participation**

A second-best practice for teacher leader professional development is the inclusion of the administrator. It is important to note that some consider this an element of JEPD (Bryant, 2017). Administrators play a vital role in supporting teacher leadership (Wenner & Campbell, 2017; White, 2020; York-Barr & Duke, 2004). However, administrators need support to learn precisely how they can shift a school’s culture to embrace teacher leadership (Sinha & Hanuscin, 2017), and to learn how to maximize teacher leadership (Jacques et al., 2016; Phillips, 2018; Strand, 2018). A qualitative analysis of a pre and post Leadership Inventory Analysis for 74 teacher leaders in Arizona revealed that teacher leaders struggled with their administrators when they attempted to share leadership as sometimes school administrators viewed teacher leaders as a “threat to their authority” (Kerr, 2015, p. 120). Similarly, Weiner and Lamb’s (2020) phenomenological study of 13 teacher leaders and six administrators in the Northeast found that principals struggled to share decision making with their teacher leaders. Like others, Bryant (2017) recommended that administrators receive training so they can support teacher leadership by sharing a “common understanding, setting clear expectations, and this will benefit the teacher
leaders, teachers, and the school” (p. 92). Administrators can better support teacher outcomes when they learn alongside their teachers (Mizell, 2010).

**Collaborative Professional Development**

A third best practice for teacher leader professional development is collaboration. Relationship-based approaches (e.g., mentoring, peer coaching, and consultation) are inherently collaborative and are quite effective (Callahan, 2016; Joyce & Showers, 1982; Learning Forward & Education Counsel, 2017; Neuman & Cunningham, 2009). Many scholars have shown that traditional “sit-and-get” (Hunzicker, 2011, p. 178) professional development approaches are less meaningful than active and hands-on collaboration (Darling-Hammond & Richardson, 2009; DuFour et al., 2010; Evans, 2014; Matherson & Windle, 2017).

A 10-year study of a teacher leader program that trained more than 250 teachers in leadership and technology revealed teacher leaders learn through collaboration (Riveros et al., 2013). A narrative study of a teacher leader certificate program in the American Southwest, utilized interviews, observations, and an analysis of personal journals and found that collaboration was a key factor for five teacher leaders who shifted their perspective of themselves and others (Mason, 2016). Findings from these two studies revealed that the supportive and collaborative environment of a cohort was a key factor in supporting a transformative learning experience for participants (Mason, 2016; Riveros et al., 2013).

Teacher leader preparation that combines collaborative and job-embedded approaches has shown positive gains for teacher leaders. Job embedded professional development provides an opportunity for teachers to evaluate and solve problems of practice and is best accomplished *through collaborative practices* (Croft et al., 2013). For example, a qualitative study examining 20 teachers’ and 6 principals’ perceptions of the impact of a hybrid (i.e., university- *and* district-
situated) job-embedded teacher leadership program that also incorporated collaboration and reflection found that participants gained skills, increased confidence, and changed their self-perception (Ross et al., 2011). Goins’s (2017) qualitative study of seven high school teachers in Southern California who participated in a large urban school district’s job-embedded and collaborative teacher leadership program revealed that social construction, reflection, and introspection were critical practices that supported their transformative growth. Carver (2016) explored a job-embedded teacher leader academy (through a document review and two-part interviews) in which 12 teacher participants engaged in collaboration and critical reflection, to reflect on their assumptions and develop leadership skills. Her analysis of participants’ journals – through Mezirow’s (2000) theory of transformative learning – revealed that participants shifted their perspectives to see themselves as teacher leaders. Taken together, this research suggests that job-embedded and collaborative professional learning—and other highly effective qualities—support participants in shifting their understanding of leadership, as well as their individual beliefs and views of themselves.

It is critical that teacher leadership preparation utilizes job-embedded and collaborative approaches. Such programs have led to increases in teachers’ confidence and their opportunities to collaborate have aided teachers to shift their perspective to see themselves as teacher leaders (Carver, 2016; Goins, 2017; Ross et al., 2011). While this research highlights the benefits of a collaborative and job-embedded model of professional development for the teacher leaders themselves, it does not address transfer or discuss how, if at all, the teachers’ participation benefited the teachers’ schools. My research partially addresses these gaps in prior research.
**Sustained Professional Development**

The fourth best practice for professional development is providing sustained *time* for professional learning. That is, giving teachers time and opportunities to learn, implement, collaborate, and reflect over the course of a semester, a year, or more. This has been shown to be helpful to setting a foundation upon which new learning can be built with a lasting impact (Calvert, 2016; DeMonte, 2013; Matherson & Windle, 2017). The amount of time teachers spend in professional learning matters (Darling-Hammond et al., 2017). Darling-Hammond and Richardson’s 2009 review of professional development literature revealed, “Teachers typically need substantial professional development in a given area (close to 50 hours) to improve their skills and their students learning” (p. 46). This sort of long-term professional development produces results for students, as well. Following teachers’ participation in intensive professional development (i.e., averaging 49 hours over the course of a year) their students showed gains of 21 percentile points. In contrast, programs with just 5-14 hours of professional development showed no statistically significant effect on student learning (Darling-Hammond & Richardson, 2009; Yoon et al., 2007). Furthermore, teachers *want* learning opportunities that are sustained over time (Matherson & Windle, 2017) and this is particularly important to teacher leadership (Carter, 2016; Evans, 2014; Hunzicker, 2012). Participants in my study echoed these ideas. That is, all of them (13/13) described how they grew more comfortable over time and many of them spoke of how they believed they could do things in year three of the DILI that they could not have done in year one.

When considering best practices in professional development, it is important to contemplate how teacher leaders use, apply, or transfer what they learned from professional
development in their practice as teachers and teacher leaders. Next, I describe transfer in relationship to teacher leadership development.

**Lack of Transfer**

Research highlights the fact that teacher leaders often have difficulty transferring the skills they learn in teacher leadership preparation programs to schools (Snoek & Volman, 2014; Weiner & Lamb, 2020). Furthermore, there is a shortage of teacher leadership preparation studies that examine the impact and influence of these programs on teachers’ schools, despite calls to do precisely that (Goins, 2017; Ross et al., 2011; York-Barr & Duke, 2004). Thus, scholars’ have called for additional research to investigate what influence, if any, teacher leadership preparation has on schools, or even entire districts (Carter, 2017; Neumerski, 2012; Snoek & Volman, 2014; Wenner & Campbell, 2017; Weiner & Lamb, 2020).

In fact, although scholars have studied teacher leadership programs that contain elements of high quality professional development, I could not find a single study of a program that included these four best practices of professional development (i.e., job-embedded, inclusion of administrators, collaborative, and sustained) and that examined the resulting behavioral changes by program participants and/or their influence on their schools. My first, second, and fourth research questions simultaneously considered how the traits of high-quality professional development contributed to what the teacher leader participants and administrator participants reported about their learning experience and how these structures influenced the transfer of their learnings to their leadership practice.
Constructive-Developmental Theory (C-DT)

The psychological theory upon which this dissertation is based is Kegan’s theory of adult development, Constructive-Developmental Theory (C-DT). This theory is the foundation of the work of Drago-Severson (2004a, 2007, 2009, 2012a, 2016a), who has extended Kegan’s theory in several ways. Drago-Severson’s work is at the heart of the developmental approach used by the DILI at the center of this study.

Contemporary developmental psychologists maintain that psychological growth can continue into adulthood, and that adults can continue to learn, grow, and evolve if they are provided with developmentally appropriate supports and challenges (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Kegan, 1982, 1994, 2000; Kegan & Lahey, 2009). While constructive-developmental theory is a theory of growth across the lifespan, in my dissertation I focus intentionally on aspects of the theory that illuminate development in adulthood, and on how adults see and interpret the world through their own meaning making systems (i.e., the different lenses through which individuals interprets life) (Drago-Severson, 2009, 2012a, 2016a).

Building from the foundation of Jean Piaget’s (1952) theory of children’s cognitive development, C-DT argues that growth can continue to take place over one’s entire lifespan, if a person is surrounded by appropriate forms of support and developmental challenge – which can help an individual develop greater and more complex internal capacities. Thus, the ways people make meaning of their experience can grow more complex over time (Drago-Severson, 2004a). Kegan described a series of ways in which adults interpret the world as an order of consciousness, developmental levels, or stages. Drago-Severson (2004a, 2007, 2009, 2012a, 2016a) called these meaning making systems, ways of knowing (WOK). I use Drag-Severon’s term, ways of knowing, throughout my dissertation.
Kegan’s neo-Piagetian theory rests on three core principles. First, constructivism – the idea that we make – or construct – meaning of our lived experiences. Second, developmentalism – the idea that we can continue to grow throughout our lives, provided that we have developmentally appropriate supports and challenges to nurture our grow. Third, the subject-object relationship – a meaning making system (or a way of knowing). With every way of knowing, people are identified with and run by – or “subject to” as Kegan (1982) termed it (p. 101) – elements or parts of their self and their world. These are things that they cannot be responsible for – nor can they take a perspective on these elements. They run people’s thinking and their feeling. In addition, with each qualitatively different way of knowing, there are parts of ourselves that we can control, be responsible for, and manage. These are parts of people’s psyche and elements of the world that they hold as “object” (Drago-Severson, 2004a, 2009, 2012a; Kegan, 1982, 2000, 2009) According to Drago-Severson (2012a), constructive-developmental theory “centers on perspective or the way we look at things because our perspective influences what we are able to see and how we understand what we see” (p. 30).

A key component of the DILI was helping participants recognize their own way of knowing. This is, in large part, recognizing the elements that are “object” and “subject” for them (Kegan, 1984, p. 200). “The subject-object relationship is the core of transformation” (Taylor & Cranton, 2012, p. 151). In the DILI there was a developmentally intentional approach that attended to developmental diversity. Constructive-developmental theory informed this approach as participants learned about Constructive-developmental theory as part of Learning-Oriented Leadership and it helped participants to recognize their own limits and assumptions. This prepared the teachers to assume acts of leadership. However, I did not to assess participants ways of knowing (WOK) in my dissertation because it was beyond the scope of this study. Instead, I
used components of this theory as a lens in my data analysis. For example, I sought to understand how, if at all, the DILI, was experienced as a support and challenge to participants in my study as I analyzed participants’ responses of their learnings, responsibilities, and challenges (Research questions #1, 2, and 3).

**Ways of Knowing**

In section, I describe the most common ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a) of adults, or “The qualitatively different ways in which adults make sense of our experiences in all domains of our lives” (Drago-Severson, Blum-DeStefano, & Asghar, 2013, p. 268). There are four primary ways of knowing – in order of increasing internal complexity along cognitive, emotional, interpersonal and intrapersonal lines of development – instrumental, socializing, self-authoring, and self-transforming. Drago-Severson focuses primarily on the three most common ways of knowing among adults (i.e., instrumental, socializing and self-authoring) the fourth is becoming a little more prevalent in today’s complex world (i.e. self-transforming).

While, as mentioned, I did not formally assess participants’ WOK in this study, this lens was helpful in understanding what participants shared about the ways they described feeling that they have “grown” and “changed.”

Drago-Severson (2004a, 2009, 2012a, 2016a) highlights the importance of being mindful of *developmental diversity*. Just as leaders should be aware of the potential implications of racial and/or ethnic diversity within their organizations, they should be aware of the developmental diversity that exists among members of their organizations as it has implications for their leadership practice (Drago-Severson, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2018b, 2019; Kegan & Lahey, 2016). Also, it is important to note that research shows that in any group of adults there will be different ways of knowing (Kegan et al., 2000). This concept of
developmental diversity (Drago-Severson, 2004a) was critical to the design of the DILI and has been in my thoughts through every stage of study design, data collection, and data analysis. It can be seen throughout my findings (Chapters VI-VIII), conclusions, and implications (Chapter IX).

The first of these WOK instrumental. People with an instrumental WOK have a concrete orientation to life and seek to know the rules. They are concerned with what is right and what is wrong. They are often guided by the question “What’s in it for me?” (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a).

The second WOK is the socializing. People with a socializing way of knowing can think abstractly and reflect, as those with this way of knowing orient to other people’s opinions, approval, and expectations of them. Right and wrong are still important, but they are not the same kind of absolute right and wrongs. Instead, they are most often guided by others’ approval and acceptance – which is usually what defines right and wrong (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a).

The third WOK is self-authoring. Adults with a self-authoring way of knowing have the capacity to work with abstract values and can prioritize competing commitments. They have their own “bench of judgment” (Drago-Severson, 2009, p. 47) and have the internal capacity to determine for themselves what is right and wrong (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a).

The last WOK in Drago-Severson’s framework is the self-transforming way of knowing. Adults with a self-transforming way of knowing have the capacity to critique their own internal value system and to incorporate competing ideas that challenge their own assumptions (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a). “Self-transforming knowers can take a principled
stand. However, they also recognize the value of looking beyond themselves…given what they see now as the bounds and limitations of their personal values and perspectives” (Drago-Severson & Blum-DeStefano, 2018c, p. 33).

Each way of knowing has its own strengths and limitations, with no way of knowing necessarily being better than the other or equating to more happiness or success in life (Drago-Severson, 2004a, 2009, 2012a, 2016a). Rather, the stages are ordered with an increasing capacity for complexity. Drago-Severson stresses that it is the fit between one’s way of knowing and the demands of one’s life (e.g., from work, from family, from friends, etc.) that makes one WOK preferable to another. She and others (Drago-Severson, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2018c; Drago-Severson, Blum-DeStefano, & Asghar, 2013; 2018; Kegan & Lahey, 2016) argue that the developmental demands of leadership (e.g., in schools) calls for a greater ability to handle complexity, such as possessing some self-authoring capacities. This often suggests a need for developmentally intentional support in order to be able to thrive as a leader.

Developmental diversity has important implications for teacher leaders because principals and teacher leaders who understand it can better provide others with the appropriate supports and challenges to help them succeed, and even to help them grow (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2016, 2019, 2020; Drago-Severson, Blum-DeStefano, & Asghar, 2013). The DILI at the center of my study provides training in understanding C-DT and the ways of knowing – focused on the context of schools and the demands of teacher leadership. My study sought to explore how, if at all, equipping teacher leaders with knowledge of developmental diversity and developmental strategies for their leadership practice could support their understanding of themselves as leaders, how they would
grow to be able to exercise leadership in teams, and how if at all it supported them in being able to exercise leadership roles as teacher leaders. That is, my research aimed to explore how teachers can use knowledge of developmental diversity to support their own practice as teacher leaders including attending to the development of other teachers in their care.

**Examining Barriers Through the Lens of Developmental Diversity**

Wenner and Campbell’s literature review (2017) identified egalitarian norms, lack of time, and lack of administrative support as the three most significant barriers to teacher leadership. I would like to use the ways of knowing to show how two of these barriers (egalitarian norms and lack of time) are challenging for all meaning making systems, but for different reasons. In Table 1 I show how these barriers (i.e., egalitarian norms and increasing workload/time) can be experienced differently by teacher leaders with different WOKs.

**Table 1**

*Developmental Barriers of Teacher Leadership for Four Ways of Knowing (WOK)*

<table>
<thead>
<tr>
<th>WOK</th>
<th>Barrier</th>
<th>Unique Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instrumental</td>
<td>Challenging Egalitarian Norms</td>
<td>The multiple sources of authority makes it challenging for them to know whom to defer to and what to do.</td>
</tr>
<tr>
<td></td>
<td>Time</td>
<td>The competing priorities of being a teacher and a leader can present challenges in trying to stick to the rules (i.e., lesson plans, &amp; planning support for teammates) and do it all with fidelity.</td>
</tr>
<tr>
<td>Socializing</td>
<td>Challenging Egalitarian Norms</td>
<td>What others think of them is what they think of themselves, and yet teachers who assume leadership roles meet resistance. Engaging in critical conversations and taking a stand is quite uncomfortable, as compared to simply being accepted.</td>
</tr>
<tr>
<td></td>
<td>Time</td>
<td>This W.O.K has difficulty prioritizing. Therefore, managing time &amp; completing tasks accordingly present challenges and can leave one feeling overwhelmed.</td>
</tr>
</tbody>
</table>
### Self-Authoring

<table>
<thead>
<tr>
<th>Norms</th>
<th>Understanding and incorporating other views is difficult. Taking others’ perspectives into consideration &amp; understanding the roots of resistance can be a challenge.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>This WOK wants their input in most issues, ideas and proposed initiatives, and they may overcommit and struggle to say no to opportunities. Teacher leadership can leave them feeling as though they are not managing their classroom and school-wide responsibilities to their internal standards.</td>
</tr>
</tbody>
</table>

### Self-Transforming

<table>
<thead>
<tr>
<th>Norms</th>
<th>There is a need to get consensus, represent all viewpoints, &amp; find common ground. While they can manage conflict, they prefer harmony.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Delegating is difficult. Asking others to share the workload could lead to disproportionate work for these adults.</td>
</tr>
</tbody>
</table>

Adapted from Drago-Severson, 2004a, 2009, 2012a; Drago-Severson & Blum-DeStefano, 2016; Drago-Severson, Blum-DeStefano, & Asghar, 2013.

The information presented in Table 1 suggests the best way(s) to support teacher leaders in overcoming barriers to leadership differs based on their way of knowing. For example, if a teacher struggles to balance their workload, a socializing teacher leader might need help learning how to prioritize their daily tasks, while a self-authoring teacher leader may need encouragement to more deeply consider perspectives that might feel like they are diametrically opposing one’s own viewpoints. Understanding their WOKs can be helpful in understanding how to differentiate support aimed to assist teachers in addressing the mixed and adaptive challenges they face (Drago-Severson, 2009, 2012a, 2016a). This proved important in my study since the teachers often connected learning about developmental diversity to their shift in perspective (see Chapter VII).

### Learning-Oriented Leadership

Learning-Oriented Leadership is a model of leadership that is built both to support developmental diversity and to foster developmental (i.e., transformational) learning among
those being led. Drago-Severson (2009) explained, “Learning-Oriented Leadership is a developmental model composed of four pillar practices that supports a differentiated approach to adult development in schools” (p. 310-311). Learning-Oriented Leadership aims to “shape schools and school systems into learning centers for collaborative learning-where educators support and challenge each other to grow” (p. x). It is built on providing a *holding environment* and the use of Drago-Severson’s four *Pillar Practices*.

While only a little more than 20 years old, there is a growing research base on the effectiveness of the Learning-Oriented Leadership model, including its use by superintendents (Codd, 2015) and by principals (Benis Scheier-Dolberg, 2014; Kanarek, 2020; Lippard, 2014; Saunders, 2018). Additionally, it is used in leadership preparation programs and districts domestically and internationally. In addition, in 2013, Drago-Severson and colleagues examined the experience of 20 participants who had taken a university-situated course on Learning-Oriented Leadership (Drago-Severson, Blum-DeStefano, & Asghar, 2013). However, research focusing on use of Learning-Oriented Leadership by teacher leaders is less common (Kanarek, 2020).

**The Holding Environment**

One key component of Learning-Oriented Leadership is the *holding environment*. In the 1960s, D.W. Winnicott (a pediatrician who studied the way mothers care for their infants) coined the term to describe the safe environments that mothers fostered to support their infants’ growth and development (Kegan, 1982). This intentional balance of support and challenge “can lead to the growth of internal capacities, as it allows for a safe space where one can reflect and engage in transformational learning, or a type of learning that changes the way we understand our reality” (Drago-Severson, 2009, p. 12).
Drago-Severson (2004b, 2009, 2012a, 2016a) describes a good holding environment as having three conditions. First, it meets the person where they are developmentally. That is, it provides support for the person, making them comfortable with what is around them and what is expected of them. Second, it provides challenges. That is, it supplies opportunities to grow by adding areas of discomfort – providing impetus to grow. Third, it stays in place. That is, it promises (and delivers) important stability that makes growth less risky. A supportive environment that can help adults grow can include a person, a group, and/or setting (Kegan 1982, 1994, 2000).

Constructive-developmental theory suggests that to support developmental growth, one needs an environment that provides support and challenges (Drago-Severson, 2004a, 2004b, 2007, 2009, 2012a, 2016a; Drago-Severson, Roy, & von Frank, 2015; Kegan, 1982, 1994, 2000). The heightened demands and scrutiny of today’s schools are not always a safe place for people to grow and take risks. Learning-Oriented Leadership aims to support people where they are, and it also aims to foster developmental growth.

**Pillar Practices**

A second key component of Learning-Oriented Leadership is Drago-Severson’s four Pillar Practices (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Drago-Severson & Blum-DeStefano, 2018a). The Pillar practices are developmentally intentional frameworks that can build capacity when incorporated as part of a leadership model and in professional learning. These four intentional structures are teaming, providing leadership roles, collegial inquiry, and mentoring. These practices can be implemented with developmental intentionality so they support adults with different ways of knowing, as they create opportunities
for adults to collaborate and engage in dialogue and reflection as tools for growth (Drago-Severson, 2012a). Pillar Practices attend to developmental diversity by offering developmental supports and challenges in order to meet adults with qualitatively different ways of knowing where they are. The four Pillar Practices all center on adult collaboration (Drago-Severson, 2004a, 2009, 2012a).

**Teaming**

The first pillar practice is *teaming* (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018). Teaming brings adults together to collaborate (e.g., on curriculum, leadership, technology, teaching, and diversity teams) to increase individual and organizational learning. Teaming can support capacity building, as adults are made to question their own and other people’s assumptions about evaluating work and about shared philosophies, while sharing perspectives and challenging their own and other’s thinking (Drago-Severson, 2004a, 2009, 2012a).

**Providing Leadership Roles**

Drago-Severson’s second pillar practice is *providing leadership roles* (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013). It is important to note that this differs from distributed leadership (Spillane, 2006), which assigns leadership roles to teachers in the school in order to spread the workload. This pillar practice instead applies a developmental lens, as an invitation for a leadership role that is given after careful consideration of goodness of fit, and with support planned to provide a holding environment as a teacher grows into a specific role (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013). That is, when practiced in
Learning-Oriented Leadership, providing leadership roles is done thoughtfully – with the intent to provide appropriate support and/or challenge to a teacher.

**Collegial Inquiry**

The third pillar practice is collegial inquiry. Collegial inquiry is purposeful dialogue aimed at examining our own and other people’s beliefs. This fosters growth by supporting adults and allowing them to listen to and learn from their own and others’ perspectives (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013). Collegial inquiry can be used to engage in professional learning such as a book club, where participants collectively share their beliefs and have the opportunity to reflect and consider varying viewpoints. This can provide both a support and a challenge, as something that is supportive for some ways of knowing can be challenging for others. When carefully employed—especially collectively—the pillar practices offer an array of choices that together contribute to the developmental diversity present in a group and is therefore supportive of fostering growth.

**Mentoring**

The fourth pillar practice is mentoring. This can include learning from a colleague or coach in a supportive way, and being a mentor to others. As with all the Pillar Practices, intentionality and goodness of fit are paramount. This practice supports adults by broadening perspectives, examining assumptions, and sharing expertise and leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013). Mentoring provides an opportunity to support and stretch adults in their learning.

The pillar practices can help build capacity, or expand people’s cognitive, affective, interpersonal, and intrapersonal capacities needed to manage the complexity of teaching, leading and living (Drago-Severson, 2004a, 2009, 2012a, 2016a). “This supports one’s ability to first
take a greater perspective on ourselves and others, second, connect more deeply and meaningfully and third, continue to learn, teach, lead, and adapt as the world evolves which is required of educators today” (Drago-Severson & Blum DeStefano, 2018c, p. 6).

**Informational and Transformational Learning in the DILI**

Scholars differentiate between two types of learning: *informational learning* and *transformational learning* (Drago-Severson, 2004a, 2009, 2012a, 2016a; Kegan 1982, 1994, 2000. Informational learning occurs when we acquire new knowledge or new skills. For example, learning how to program a computer or learning to use a new feature on a smart phone constitute informational learning. Transformational learning, is quite different it can be defined as:

The development of increased cognitive, emotional, interpersonal, and intrapersonal capacities that enable a person to manage better the complexities of work and life. Interchangeable with growth, it is a qualitative shift in how a person actively interprets, organizes, understands, and makes sense of his or her experience, and develops increased capacities for better managing the complexities of daily life (Drago-Severson, 2009, p. 312).

Drago-Severson and Blum-DeStefano (2018c) pointed to capacity building and transformational learning as growth in our ability to take on other perspectives, to manage contradictory demands, collaborate more effectively, to lead beyond one’s comfort level, and to engage in the continuous learning that is required of 21st century educators.

In order to assist educators in managing the complex demands they face, schools need professional development that supports both informational and developmental growth (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeSefano, 2018c). For example, teacher leaders need informational learning such as learning how to facilitate professional development. Teacher leaders also benefit from opportunities to shift their thinking. Commonly, teachers struggle to see themselves as leaders. Often the word leader carries a negative
connotation, making teachers resistant to seeing themselves as leaders (Carver 2016; Fairman & Mackenzie, 2012; Katzenmoyer & Moller, 2009). Thus, it is important to create conditions that will support teachers in engaging in transformational learning so they can reflect, challenge assumptions, and over time shift their identity to see themselves as leaders (Carver, 2016; Kendall, 2019; Poekert et al., 2016; Ross et al., 2011).

The demands of leadership and the abilities to stand up for what one believes in, engage in critical conversations, learn how to set boundaries, and balance responsibilities are not merely skills, but are instead developmental capacities. The capacity to execute these leadership skills requires some self-authoring capacities (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano, 2018d, 2019; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Eigel & Kuhnert, 2005; Kegan & Lahey, 2016). Leadership responsibilities and adaptive challenges often require a self-authoring ability to “synthesize diverse viewpoints, critique ideas, and explore and develop their own goals” (Drago-Severson, 2009, p. 60). Research indicates that as many as 58% of the adult population does not yet have this capacity (Kegan, 1982; 1994; 2000; Kegan & Wilber 2001). Preparing leaders for managing the complexity of today’s environment requires developmental intentionality that will support adults across a spectrum of developmental diversity and better support their capacity to lead.

Again, this study was not designed to measure transformational learning however, it informed my analysis as I analyzed RQ #2 (i.e., DILI enrollees’ ideas about DILI learnings) and RQ #4 (i.e., administrator’s observations of the influence of the DILI on teacher leadership) and considered the participants’ description of their learning.
Learning-Oriented Leadership as a Model of Professional Development

Evans (2014) explained, “Professional development is not simply about changing behavior or production. It must also incorporate a change in attitudes, intellectual capacity, and mindsets” (p. 193). He cited Borko and Putnam (1995, p. 60) when stating that “Successful professional development efforts help teachers acquire new ways to think about learning, learners, and subject matter.” Calvert (2016) noted that Learning Forward and the National Commission on Teaching and America’s Future (NCTAF) distinguish professional learning – which “recognizes teachers as agents of their growth and that learning is an experience driven by their learning” (p. 4) from professional development. This definition mirrors the principle tenets of Learning-Oriented Leadership, as it presents a model of professional learning and leadership that is developmentally intentional in supporting adults with diverse ways of knowing as active agents of their own learning. Therefore, when referring to the DILI I will describe the learning that the teacher and administrator participants engaged in as professional learning rather than professional development because the institute is intentionally designed with the teachers as agents of their own growth and as such sought to support them in both informational learning and capacity building.

Learning-Oriented Leadership Summary

My research sought to extend the work of Drago-Severson in a number of ways. First, it is focused on the role of teacher leaders (as opposed to formal school and district leaders) particularly those without formal leadership titles. Therefore, it examined how leaders who do not have any formal authority are able to use Learning-Oriented Leadership in their leadership practice. (See Chapter VI, VII, and VIII). Second, it examined a district-based program (as opposed to a university-situated experience, or the efforts of an individual leader). Like
Learning-Oriented Leadership itself, my study aimed to support teachers, school leaders, and other educational stakeholders in more effectively supporting teacher leadership as a way to meet the growing demands of our current education climate.

The MELC School District

The research site was selected based on a specific professional learning opportunity for teacher leaders that was based on the aforementioned bodies of literature. In this section, I describe the research site and the specific elements of the DILI. That is, I will explain its developmentally intentional approach to growing teacher leaders that utilized Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a), best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015), and the inclusion of administrators.

The MELC School District (an alias to protect privacy) is a suburban public-school district commuting distance from a large U.S. city in the northeast. It serves students in kindergarten through eighth grade. There are three schools in the district:

- a K-2 school
- a 3-5 school
- a 6-8 school

Together these schools enroll almost 1,000 students and employ 90 classroom teachers, 3 building principals, and 3 more supervisors. The central office staff includes the superintendent and the business administrator.

Every decade, the Department of Education in MELC’s state school districts multiple categories, based upon socioeconomic status (SES). MELC has been grouped in the second
highest SES category – as it happens, the largest category. While high SES typically correlates with higher student performance, in 2016 – during the first year of the DILI – MELC scored significantly lower than the other districts in its official SES category.

**MELC’s Developmentally Intentional Leadership Institute (DILI)**

As part of my responsibilities as a curriculum supervisor in the MELC school district, I worked with Dr. Ellie Drago-Severson to create a developmentally intentional leadership institute (DILI) with the three main goals for its aspiring (informal) teacher leaders:

1. Learn about adult development and developmental diversity.
2. Learn about Learning-Oriented Leadership and the Pillar Practices.
3. Apply these learnings to a self-selected topic of interest that entailed assuming a self-selected leadership role.

This led to the formation of a three-year DILI for teachers who volunteered to participate in the program in order to support their own leadership development.

**Process of Applying to the DILI**

In 2016, MELC’s superintendent and I crafted an email message to invite all 90 teachers across the district to apply to be part of the new DILI program. (See Appendix H for the original email). The superintendent and I invited interested teachers to email the superintendent if interested in being part of the initial cohort. That invitation email suggested that teachers would be selected on a first-come/first-serve basis for 16 spots in the DILI cohort. However, upon receiving more applicants then we had anticipated (and with many having been received at the same time), the district’s school principals and superintendent worked together to select a range of the candidates from their respective schools.
Their first consideration in selecting DILI participants from the volunteers was to include an equal number of teachers from each of the three schools in the district. There were just five applicants from the K-2 building, so all of them were selected. The 3-5 school and 6-8 school buildings each had a larger number of applicants. Their respective principals chose teachers with a range of experiences (i.e., across multiple grade levels and teaching specialties) to take part in the program. In order to equitably choose just five participants per school, the two principals opted to not choose non-tenured teachers which produced five applicants per building. At the time of the selection process, I had only been in the district for two months and did not know the participants. Therefore, I did not participate in the selection process. They simply provided me with the final list of enrollees’ names.

**DILI Schedule**

In September of 2016, the MELC school district introduced the DILI to its initial cohort of teachers and administrators. The 16 teachers and 7 administrators met monthly through each school year, for a total of 24 professional learning sessions. Three teachers dropped out of the program after one or two years of participation, and one administrator resigned – leaving 13 teachers and 6 administrators who completed the DILI program. Each meeting lasted for three hours, with teachers classroom duties covered with half-day substitutes. I facilitated 18 of the sessions over the course of three years. Each year, two of the sessions were full-day sessions facilitated by (my doctoral advisor) Dr. Ellie Drago-Severson. All DILI meetings were held in the MELC Board of Education conference room.

**DILI Curriculum**

This developmentally intentional learning institute provided information to teachers, school principals, and district supervisors addressing the most common barriers to teacher
leadership (see above). It both embodied and explicitly taught Drago-Severson’s Learning-Oriented Leadership model, including the concept of the holding environment and her four Pillar Practices. It was designed to provide participants with the time, structure of learning (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015), and the curriculum that would support them in learning about and experiencing the topics shown in Table 2 and discussed next.

**Table 2**

*DILI Curricular Focus and Activities, by Year*

<table>
<thead>
<tr>
<th>Year</th>
<th>Curricular Focus</th>
<th>Meeting Activities</th>
</tr>
</thead>
</table>
| Year 1:            | **Leading with developmental diversity in mind.**                                                                                                                                                    | • Introduction to teachers as leaders & ETS Teacher Leader Standards  
• Introduction to Learning-Oriented Leadership & ways of knowing  
• Adaptive and technical challenges  
• Setting a developmentally intentional improvement goal  
• Collegial inquiry: Professional book club (Daring Greatly, by Brene Brown)  
• Understanding & overcoming egalitarian norms as a teacher leader |
| (2016-2017)        | **8 Sessions, 30 hours**                                                                                                                                                                              |                                                                                                                                                                                                                  |
|                    | Introduce adult development and developmental diversity by learning about our own and other’s ways of knowing to increase self-awareness and support leadership development. |                                                                                                                                                                                                                  |
| Year 2:            | **Using Developmental Practices to Lead our Teams**                                                                                                                                                   | • Norms/Check Ins & meeting logistics.  
• Administering team improvement surveys & setting an improvement goal.  
• Teaming, from a developmental perspective.  
• Strategies & role playing for critical conversations  
• Understanding & overcoming egalitarian norms in a team setting.  
• Collegial inquiry: Strengthsfinder (by Don Clifton) |
| (2017-2018)        | **8 Sessions, 30 hours**                                                                                                                                                                              |                                                                                                                                                                                                                  |
|                    | Understanding research on teaming and learning developmental strategies to implement in team meetings.                                                                                               |                                                                                                                                                                                                                  |
| Year 3             | **Choosing a leadership role.**                                                                                                                                                                       | • Collegial inquiry: Start with Why (by Simon Sinek) & self-selected professional texts to support their leadership project.  
• Feedback with developmental intentionality.  
• Collegial inquiry.  
• Team surveys & improvement goals |
| (2018-2019)        | Participants each identify a topic they are passionate about and choose a leadership role so they can lead a                                                                                         |                                                                                                                                                                                                                  |
|                    |                                                                                                                                                                                                        |                                                                                                                                                                                                                  |
In the institute, teachers learned to apply these principles and practices by engaging in activities with the explicit intention of helping them to be better prepared to execute the responsibilities of teacher leadership and the hope of growing participants’ ability to handle complexity (i.e., internal capacities). Careful consideration was given to ensure that there was a safe environment in the DILI so that participants could fully embrace being present in their learning. During the three hour-long sessions, the cohort experienced and witnessed modeling of developmentally intentional activities aimed at supporting leadership development. Specifically, the training involved learning about their own and others’ ways of knowing—and why these matter to teamwork, collaboration, leadership roles and teaching. In addition, participants learned how to support their own and other peoples’ development, developmental approaches to teaming, using a developmental approach to give feedback, engaging in difficult conversations, and assuming leadership roles. They were given ample opportunities to practice acts of leadership so that they could grow professionally and engage in authentic- and challenging- work before they assumed acts of leadership in their respective schools.

The DILI was designed to provide developmental support for participants to engage in learning, take risks, and experience developmental support to aid in their leadership practice. These types of supports and challenge have the potential to foster transformational learning; however, measuring this kind of growth was beyond the scope of my study.

**Cohort Learning**

Drago-Severson (2004b) defines a cohort as a *tight-knit, reliable, common-purpose group*. Studies have found that cohorts can be supportive in improving members’ learning.
experience by providing emotional support (Drago-Severson, 2004b; Mandzuk et al., 2005). In other words, cohorts have the potential to serve as a holding environment. Drago-Severson (2004b) reports that a cohort can support, “academic learning, emotional, and psychological well-being, and help broaden the perspectives” of participants (p. 15). She noted, “Building capacity and practicing shared leadership requires a good holding environment that supports a person where they are and challenges them to grow beyond that” (2009, p. 12-13.) The combination of perspective taking, collaboration, and continuous learning are guiding principles to support capacity building (Drago-Severson, 2004a, 2007, 2009, 2012a; Drago-Severson & Blum-DeStefano, 2018a). Furthermore, a safe environment where teacher leaders can take risks and receive feedback is critical (Hallman, 2017). The participants were carefully selected to form a cohort in the DILI, and time was provided for team building so the cohort could develop relationships and establish trust. Despite multiple requests from other teachers to join the cohort, no additional teachers were admitted into the cohort, even though three original participants declined to continue.

**MELC School District Summary**

The MELC school district’s DILI was particularly well suited for my study (see Chapter III for a full discussion on my site selection criteria). Its curriculum, its inclusion of administrators, and its inherent job-embeddedness and best practices in professional development are just three traits that made it so appropriate.

**The Gaps**

Teacher leadership is at the center of school improvement, yet studies about supporting teacher leadership are only emergent (Szeto & Cheng, 2018; Weiner & Lamb, 2020; Wenner &
There is a growing body of research that describes teacher leadership preparation programs (Ado, 2016; Borchers, 2009; Bryant, 2017; Carver, 2016; Coughlin, 2015; Durias, 2010; Edge & Mylopoulos, 2008; Fairman & Mackenzie, 2012; Goins, 2017; Hall & Clappe, 2016; Hofstein et al., 2004; Hanuscin et al., 2012; Hunzicker, 2012, 2018; Lowery-Moore et al., 2016; Mason, 2016; Moss, 2015; Osmond-Johnson & Campbell, 2018; Ross et al., 2011; Silva et al., 2000; Sinha & Hanuscin, 2017; Taylor et al., 2011; Weiner & Lamb, 2020). There is also research that describes expectations of teacher leaders, including standards (Teacher Leadership Exploratory Consortium, 2011), and more recently competencies (Teacher Leadership Competencies, 2014). However, far less is known about the outcomes of these programs (Carver, 2016). Transferring newly acquired teacher leadership skills into practice remains a challenge that scholars are just beginning to address (Evertson, 2020; Snoek & Volman, 2014).

Quite simply, there is a lack of research that describes in detail effective approaches for nurturing teacher leadership skills, as well as the influence and impact of teacher leader training on teachers and schools (Bryant, 2017; Carver, 2016; Evertson, 2020; Goins, 2017; Lowery-Moore et al., 2016; Ross et al., 2011; Wenner & Campbell, 2017). Furthermore, there are not any studies that explore how (if at all) developmentally intentional, sustained, and job-embedded teacher leadership training that incorporates best practices in professional development and the participation of administrators may bridge the chasm between training and transfer. While the inclusion of administrators in teacher leadership training appears promising, there is a dearth of research into its effectiveness, as well (Weiner & Woulfin, 2018).

My study addressed these gaps by studying the teacher leaders who enrolled in this district’s developmentally intentional learning institute (DILI) that included administrators in the
program’s training. Through my four research questions, I examined how this program helped participants address their teacher leadership responsibilities and the obstacles and barriers they encountered. Thus, I hope my findings (see Chapters VI-VIII) build on and extend the work that has most inspired me: the application of Kegan’s *Constructive-Developmental Theory* to schools and school leadership by Drago-Severson.

**Chapter Summary**

The goal of my study was to explore how 13 teachers experienced a three-year developmentally intentional learning institute aimed at supporting their practice as teacher leaders. In this literature review, I described the national context and the way it shifted the arena for teacher leadership. I also described the challenges of current leadership models through adaptive leadership theory (Heifetz, 1994). I then described the history of teacher leadership and how teacher leaders are supported in comparison to the literature on professional development. I explored Kegan’s Constructive-Developmental Theory and Drago-Severson’s Learning-Oriented Leadership as a developmental model of leadership and professional development in conjunction with effective practices of professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) as a way to support teacher leadership. Finally, I reviewed the history, curriculum, and major features of the developmentally intentional leadership institute at the center of this study. I concluded by highlighting the gaps in the literature that my study addressed.
CHAPTER III: METHODOLOGY

The purpose of this qualitative study was to explore the experiences of 13 teachers who formally participated in a three-year developmentally intentional leadership institute (DILI, hereafter), and to learn how, if at all, that institute helped them develop skills to support them with the challenges associated with teacher leadership. This includes skills such as learning how to have critical conversations, taking a stand for what one believes in, establishing developmental protocols to support their teams, and assuming a leadership role (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018). In this chapter, I explain in detail the methodology I used and provide background on the DILI and why I selected this particular site in which the participating teachers took part (see the Site Selection section). While I mention descriptive characteristics of the site and the DILI curriculum in Chapter 2, here I focus primarily on the criteria I employed for site selection.

In this chapter, I first again present my research questions, which guided my decisions about my methodology for data collection and later data analysis. Following that, I present my rationale for using qualitative research methods, and specifically my rationale for using a case study approach. Next, I describe the research site and my criteria for selecting this site. I then outline the steps I took for data collection and data analysis. Finally, I discuss issues of validity and limitations of my study.

Research Questions

Four research questions guided my study.

1. How do 13 teacher leaders who took part in a developmentally intentional leadership institute (DILI) describe and understand the leadership responsibilities
they assumed if any? What challenges, if any, do they report facing as they developed their leadership practice?

2. How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities?

3. What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their most significant work-related challenges, both in general and particularly around managing workload, collaboration, and teaming?

4. How do six school and district administrators (who directly supervise the teacher participants) describe and understand the influence of the three-year DILI on the formal and informal leadership practices of the teacher participants?

**Rationale for a Qualitative Research Design**

Marshall and Rossman (2006) explained that qualitative methodologies have been employed to explore, explain, and/or describe a phenomenon. Maxwell (2013) added that the goal of qualitative research is to understand the meaning, context, and process of participants’ experiences. Specifically, he noted that qualitative research can lead to a greater understanding of the meaning for participants in the study by exploring their process, and understanding of the unique circumstances that may have shaped the participants’ experiences.

I chose a qualitative research design because it is grounded in a constructivist orientation, and it applies an interpretive approach (Creswell, 2013). That is, it offers an orientation in which knowing is a process of actively interpreting and constructing individual knowledge (Jonassen & Rohrer-Murphy, 1999). My research was aimed at learning about the experiences of a cohort of
teacher leaders regarding how, if at all, their participation in a three-year DILI helped them to grow their leadership practice. This study centered on learning from the participants’ subjective perspectives, and their understanding of how their experiences shaped them. Therefore, a qualitative approach was most appropriate.

**Rationale for a Case Study**

I selected a case study methodology for this qualitative research because my purpose was to bring out the various viewpoints and perspectives of participants using multiple sources of data (Yin, 2014). Particularly, my study has been an exploratory case study – as opposed to explanatory, descriptive, instrumental, collective, and/or intrinsic (Stake 1995; Yin, 2014) – because I wanted to understand what influence, if any, the DILI had on the development of the emerging teacher leaders’ ability to exercise their leadership practice. Creswell (2014) noted that a case study is often a program in which a researcher conducts in-depth analysis and collects detailed information using a variety of data collection methods over a period of time. While this study had not been a program evaluation, I have sought to investigate a bounded professional learning institute in one school district. That is, I wanted to understand the three-year experience of 13 teacher leader participants’ of a particular program. Therefore, case study methodology was appropriate. Using a case study approach allowed me to understand how, if at all, 13 teachers who experienced a unique three-year developmentally intentional leadership institute applied their learnings in executing leadership skills.
Research Design Overview

In this section I provide an overview of my research processes.

Step 1: Identify Research Topic

I selected a current and prevailing problem which I had encountered in my own work as a teacher leader and district administrator. I was interested in determining how a district-sponsored, developmentally intentional leadership institute for informal teacher leaders that included their school administrators might influence the development of teacher leadership in a small school district.

Step 2: Conduct Literature Review

I used my selected review of the literature (conducted in the initial stages) to inform the development of the conceptual framework for this study. I continued to use the literature and conceptual framework throughout the study in order to provide a framework for interpretation and analysis of the study’s findings. In Chapter II I discussed details regarding the literature that informed my study.

Step 3: Proposal, IRB and District Approval

As TC’s IRB requires site approval before IRB review, I sought permission from the MELC school district (a pseudonym, as mentioned earlier) at one of its regular board meetings (Appendix I). Upon successfully defending my proposal, I immediately filed for IRB approval from the Teacher College (Columbia University) Institutional Review Board and received approval (Appendix J).
Step 4: Pre-Recruitment of Participants

Once I identified my preferred research site, it was clear that I would want to include all of the DILI’s participants. There was a cohort of 13 teachers and 6 administrators who have participated in the entire three-year DILI, plus 3 teachers who did not complete the DILI. I wanted to invited all of them to participate in this study.

At the June DILI meeting, I introduced the study to the potential participants. I explained the time requirements of my study, what I hoped to learn, and told them that no one was required to participate in this study. I explained to the participants that it was their choice as to whether or not to participate in my research voluntarily. I also shared that if they decided not to participate it would not be held against them. In addition, I let them know that an external interviewer, trained in qualitative research would be interviewing anyone who volunteered to take part. I shared that I would send a follow up email, re-explaining the purpose and time commitments of the study and emphasizing again that participation would be voluntary. I told them that I would make time to talk with any of that that had any further questions.

Step 5: Invitation Letter to Potential Participants

After receiving approval from the MELC school district and TC’s IRB, I sent the formal invitation email to the potential participants (Appendices K-M). I remain grateful that all 22 potential participants volunteered to participate in this study. Once they volunteered, I then emailed them the appropriate informed consent forms, per IRB (Appendices N-P) requirements.

Step 6: Survey

During a district-wide faculty meeting I notified all of the teachers in the MELC school district that I would be inviting them to fill out an online survey in their own time (the survey was open for two weeks.) I explained that this survey was anonymous, voluntary, and the data
that was to be collected would be used to inform my dissertation (Appendix A). The survey began with an informed consent form, so that the teachers would know the nature and purpose of my study, and were informed of their rights as respondents in my study (Appendix Q).

Because I wanted to use the opportunity of this faculty meeting to invite the district’s teachers to take the survey, I first applied to TC’s IRB to get special early approval for the survey portion of my study. I received this approval on 6/13 before I introduced the survey to the teachers.

**Step 7: Interviews**

Due to my dual role (i.e., both as researcher and as facilitator of this DILI), an external interviewer (who has CITI certification and works in higher education to support doctoral students in nursing education) was hired to conduct the interviews during the summer and fall of 2019 (Alm, 2017). While I would have loved to conduct the interviews for my study, I was aware that there could likely have been a problematic power dynamic at play – since I was also a curriculum supervisor who performs evaluations. Therefore, I forwent my interest in interviewing to do what was best for the study (i.e., in terms of reliability, trustworthiness, and validity). In order to accommodate the schedule of this external interviewer and of each of the participants (i.e., including the principals and the teachers), the interviews took place over the phone or via an Internet equivalent (e.g., Skype, FaceTime). Each interview was recorded and transcribed verbatim.

**Step 8: Data Analysis**

Over the course of fall and winter, I coded and analyzed all of the data I collected according to the conceptual framework presented in Chapter II (Maxwell, 2013). Throughout the data analysis stage, I revised my code list, going from my preliminary list to my final code list.
(Appendix R for both lists), memoed (Maxwell, 2013) and worked towards my findings. See below for a fuller explanation of my analytic process.

**Step 9: Write Up**

I began my formal efforts to write up my findings during the 2019 fall and winter. This was an iterative process (Maxwell, 2013). I shifted from writing my analysis and would go back to writing. Having more or less come to my final findings in February, I fully engaged in writing my analytical chapters throughout the spring of 2020.

**Site Selection**

In this section, I explain my three criteria for site selection. The selection was practically, theoretically, and conceptually driven, and centered on a long-term or longitudinal developmental approach to train informal teacher leaders.

My first selection criterion was a school district with a multi-year, sustained, leadership development institute for teachers based on Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a). This teacher leadership program had to incorporate best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) and developmentally intentional components, including a district supported job-embedded experience.

My second criterion was that the program must include both teachers and administrators. This was particularly important to me because I had previously designed, lead, and introduced a teacher leader institute in my former school district, but that program had not been fully supported by administration. I wanted to make sure that the program I studied did not suffer from that problem. While including administration was important primarily based on my own
experience, the literature is clear on the need for administrators to participate in teacher leader training (Bryant 2017; Kerr, 2015; Phillips, 2018; Snoek & Volman, 2014; Stand, 2018; Wenner & Campbell, 2017, White, 2020).

My third selection criterion was that it had to be a small-sized school district. This was important to me because smaller districts tend to not have the same amount of administrative support (e.g., coaches, department chairs, or vice principals) as larger districts (Niederberger & Polke, 2014), making the need for teacher leadership all the greater, in my view. This was also personally important to me, as I have spent my years as an administrator exclusively in small school districts. I know that I have better insight and understanding of the particular dynamics and pressures of such districts.

The only small district I could find that provided sustained leadership development for potential teacher leaders based on Learning-Oriented Leadership and included administrators was the MELC school district, where I work as a curriculum supervisor. It is important to note that I had sought other research sites, and had found two potential research sites. However, one failed to secure administrator participation and the second did not adopt a DILI so neither met the site selection criteria.

I selected the MELC school district for my research based on these three criteria that provide a unique approach to supporting teacher leaders. First, MELC’s program is one of the only multi-year developmentally-oriented teacher leadership programs. Second, it is the only program that is located in a small sized school district (i.e., defined as less than 1,000 students; Boser, 2013). Third, to the best of my knowledge, it was the only district that has building- and district-level administrators participate in developmentally intentional professional learning with their informal teacher leaders. Thus, this site provided a distinct opportunity to learn from both
the teachers and administrators about how, if at all, a developmentally intentional model of professional learning can support informal teacher leadership.

**Participant Selection**

I employed a purposive sampling strategy (Palys, 2008), as I deliberately chose participants (as opposed to the use of a random sample). My selection criteria for interview participants was to include all the teachers and administrators who had participated in the DILI – both those who have participated in the full three years and those who had not. My selection criteria for the survey was similarly simple: to include all the teaching staff in the MELC school district.

**Teacher Participants**

Thirteen teachers and six administrators participated in the entire three-year institute, which ended in June of 2019 (i.e., shortly before data collection began). I also invited the three teachers who chose to not complete the DILI to participate in the study because I believed that learning from their experience – and specifically why they dropped out – could have powerful implications for better understanding how to support teacher leaders. (See Chapter II for my explanation of how they were selected for the DILI by the district.) I invited all 22 program enrollees to participate in the study – 6 administrators, 13 teachers who completed the institute, and the 3 teachers who dropped out. All 22 graciously volunteered their time and were participants in the study.

Table 3 shows the demographics of the teacher enrollees (pseudonyms are used to protect participants’ confidentiality) in the MELC DILI cohort.
Table 3

**DILI Completer Participants**

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Race/Ethnicity</th>
<th>Total Years of Experience</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angelica</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>50s</td>
</tr>
<tr>
<td>Cathy</td>
<td>F</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Edith</td>
<td>F</td>
<td>White</td>
<td>5-10</td>
<td>30s</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Emma</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Fatima</td>
<td>F</td>
<td>White</td>
<td>10-15</td>
<td>50s</td>
</tr>
<tr>
<td>Franny</td>
<td>F</td>
<td>White</td>
<td>10-15</td>
<td>50s</td>
</tr>
<tr>
<td>Gabriella</td>
<td>F</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Joan</td>
<td>F</td>
<td>White</td>
<td>5-10</td>
<td>30s</td>
</tr>
<tr>
<td>Katie</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Mary</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>50s</td>
</tr>
<tr>
<td>Patricia</td>
<td>F</td>
<td>White</td>
<td>10-15</td>
<td>30s</td>
</tr>
<tr>
<td>Rosa</td>
<td>F</td>
<td>White</td>
<td>10-15</td>
<td>50s</td>
</tr>
</tbody>
</table>

Table 3 illuminates the age, race, gender, and length of experience for each teacher who completed the DILI. Table 4 lists the three participants who dropped out of the DILI (by their own choice), including the only male teacher enrollee. I have given him a female pseudonym to protect his confidentiality. Throughout this dissertation, I refer to the first group as *DILI completers* and the second group as *non-completers*.

Table 4

**DILI Non-Completers Demographics**

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Race/Ethnicity</th>
<th>Total Years of Experience</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
</tbody>
</table>
Administrator Participants

In accordance with recommendations from the literature, principals and a key district administrator (i.e., the curriculum supervisor) were asked by the superintendent to attend every training session, as a way to support the teacher leaders in their schools (Bryant 2017; Kerr, 2015; Phillips, 2018; Snoek & Volman, 2014; Stand, 2018, White, 2020). During the three years of the DILI, the superintendent and the business administrator opted to attend the sessions, as well. Table 5 shows the demographics of these six administrators (again, pseudonyms are used to protect participants’ confidentiality).

Table 5
DILI Administrator Enrollees

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Race/Ethnicity</th>
<th>Total Years of Experience</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bud</td>
<td>M</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Elmer</td>
<td>M</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Francis</td>
<td>M</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Lynda</td>
<td>F</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Nicholas</td>
<td>M</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Suzanne</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
</tbody>
</table>

The six administrators described above are homogenous in race/ethnicity. There are four males and two females. These administrator participants were evenly divided between school-based and central office administration.
Data Collection

In this section, I first give an overview of the information that I used to address my four research questions. I then explain the data collection methods I chose in order to answer my research questions, including, a survey (Appendix A), and semi-structured interviews with the teachers who completed the DILI (Appendices B and C) and with the non-completers (Appendix D) who did not. My third source of data comprised of additional interviews with the district- and building-administrators who supervised the teachers (Appendices E and F). I used these three sources of data to identify themes and draw conclusions. The survey, administrator, and teacher interviews provided three vantage points to provide triangulation (Maxwell, 2013).

Overview of Information Needed

I utilized four kinds of data in order to address my research questions: contextual, perceptual, demographic, and theoretical.

Contextual

The context for my study was a Northeast based K-8 school district. It was, therefore important that I identify factors in the school district environment that may have influenced the behavior of the participants. I collected this data through a survey, primary interviews, and secondary interviews.

Perceptual

Perceptual data refers to the experiences of the 13 teachers who participated in the full three-year DILI, 3 teachers who partially completed the DILI, and 6 administrators who also participated in the three-year DILI alongside their teachers. I collected this data by conducting interviews with the DILI completers, the non-completers, and the administrators (Appendices B, C, D, E, and F). – my main method of data collection (Bloomberg & Volpe, 2008).
**Demographic**

I collected demographic data that described various aspects of the participants’ identities, as this data proved useful in understanding the context for each participant. For example, in Figures 3.1, 3.2, and 3.3, I made comparisons to identify themes such as years of experience across each set of participants (Maxwell, 2013).

**Theoretical**

I uncovered theoretical data through my interactions with the literature, which I have continued to pursue throughout this project. I used the literature to guide the design of my study and my interview protocols. I also used the literature to guide the analysis and interpretation of the findings (Bloomberg & Volpe, 2008), as shown in my preliminary and final coding schemes (Appendix R).

**Survey**

My first step in the data collection process was to administer a survey to the teachers in the MELC school district. Sixty-Seven out of the 90 teachers completed this survey by June 30, 2019. With this survey (see Appendix A), I aimed to answer my third research question, as I wanted to understand the challenges the larger group of all the teachers in the district named. I asked respondents to identify if they participated in DILI program, so that I was able to compare the survey answers of the DILI teachers with those of the non-DILI teachers.

The survey was introduced to teachers at a faculty meeting at each school, on June 17th, 2019. For reasons stated above (i.e., potentially problematic issues of reactivity), I did not ask teachers to fill out the survey with me in attendance. Instead this meeting merely introduced the study, asked for their consideration in taking the survey, and provided an opportunity for them to ask questions. Following these faculty meetings, I sent the survey out electronically utilizing an
online platform (Google Forms) to deliver the survey. The survey began with a request for informed consent and followed with optional questions about demographics (i.e., gender, age and ethnicity), content specialty, and years of experience (as shown in Appendix A). It concludes with six sets of parallel questions, each set about “challenges” they experience concerning:

- Students
- Parents
- Colleagues
- Teaming
- Implementing Curriculum
- Administrators

As I discuss in Chapter IX and V, the term “challenge” proved problematic as it had a particular technical meaning (see Chapter II) that was included as part of the curriculum of the DILI, it means one or two particular things to members of the DILI, as opposed to the more colloquial meaning understood by the whole faculties. Unfortunately, I did not realize this until far too late to correct it.

**Interviews**

My primary method of data collection was the semi-structured interviews (Appendices B, D, E, F, and G) with the 22 DILI enrollees in order to learn from and about their experiences (Bloomberg & Volpe, 2008; Rubin & Rubin, 2005). The main focus of my study were the interviews with the 13 teachers who completed the full DILI program (Appendices B and D). The secondary focus was interviews with the administrators who took part in the DILI (Appendices F and G) and with the teachers who dropped out of the DILI (Appendices E and F). Through these interviews I sought to learn how, if at all, the teachers and administrators
described their learning, and how, if at all, their experience in the DILI helped the teachers with the challenges they faced in their leadership practice (i.e., my first three research questions).

Table 6 shows the total length of interview data I collected. The DILI completer interviews took place over the course of two, 60-minute sessions. Administrator interviews took approximately 90 minutes each. Finally, interviews with three DILI non-completers who did not complete the program were scheduled to take 60 minutes. Thus, I had hoped for a total of 38 hours of interview data. The actual number of interview hours totaled 34 hours and 7 minutes.

Table 6

*Potential Total Interview Data (Hours)*

<table>
<thead>
<tr>
<th>Role</th>
<th>Number</th>
<th>Interviews/Participant</th>
<th>Length/Interview</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full DILI Teacher Enrollees</td>
<td>13</td>
<td>2</td>
<td>60 Minutes</td>
<td>26</td>
</tr>
<tr>
<td>Partial DILI Teacher Enrollees</td>
<td>3</td>
<td>1</td>
<td>60 Minutes</td>
<td>3</td>
</tr>
<tr>
<td>Full DILI Administrator Enrollees</td>
<td>6</td>
<td>1</td>
<td>90 Minutes</td>
<td>9</td>
</tr>
<tr>
<td>Total</td>
<td>22</td>
<td>35 interviews</td>
<td></td>
<td>Anticipated: 38 Actual: 34</td>
</tr>
</tbody>
</table>

Pilot Interview

As part of a course on qualitative methods, I conducted a pilot interview with three teachers who had participated in the first teacher leader cohort I facilitated in my former school district. I found that, due to the way I framed my questions, participants’ answers were not stories. This gave me the opportunity to refine my interview protocol. I revised my questions to be more open-ended and to invite participants to share more in their answers. I conducted a second pilot interview with my revised questions with a fourth teacher from the teacher leader cohort in my former district. With the protocol, I learned that I needed to explicitly rename the research purpose verbally at the start of the process and to provide a reminder of the content
covered in each of the three years. I worked with my sponsor to revise my questions to be more specific and less verbose.

**Interview Protocols**

I designed the open-ended questions in my interview protocols for *this* study (Appendices B-G) to “use their words to interpret the meaning of the described phenomena” (Kvale & Brinkmann, 2009, p. 3). I used a semi-structured protocol to provide flexibility to invite to participants’ stories (Locke et al., 2014). In both the teacher and administrator interviews, I began the protocol by reminding participants of confidentiality, asking permission to record, and reviewing the purpose of the study. In the second section of each interview, I created a space for participants to share their professional and personal background. In the third section, I had the interviewer ask open-ended questions related to my research questions.

Following transcription and analysis of the interviews, I sent each participant a copy of the transcript to review for accuracy and invited participants to engage in a follow up conversation with the external interviewer to verify my analysis of their interview data (i.e., member checking). While all 13 DILI completers engaged in member checks after their first interview, only two accepted the external interviewer’s invitation for a follow up conversation. This supported interpretive validity (Maxwell, 2013). None of the participants had ever participated in qualitative research before, and they told me that they found the verbatim nature of the transcripts unsettling. Although the DILI had ended, the cohort still met a few times during the year to support each other’s’ leadership efforts and during one such meeting, conversation shifted to their transcripts. They explained to me that they were uncomfortable with the “ums” and improper grammar in their transcripts. They collectively asked for them to be removed. Additionally, one administrator brought up the issue of pseudonyms, and I repeated that while
the transcript I provided to them had their names, I would use pseudonyms going forward in any
write up of my research, including this dissertation.

**Terminology in Interview Protocol**

Throughout this dissertation, I refer to the program I studied as the Developmentally
Intentional Leadership Institute (DILI). In practice, the teachers and administrators referred to
the DILI as a “Teacher Leader Cohort.” In fact, they often just refer to it and its meetings using
the shorthand “Leadership” or “Cohort.” In the interview protocol I used the term they were most
familiar with. I used the term “colleagues” (i.e., rather than cohort) to avoid confusion between
the people who were enrolled in the DILI and other teachers who they worked with.

**External Interviewer**

Given my dual role (as the lead facilitator of the DILI and as a researcher), there may
have been increased problematic power dynamic/reactivity issues had I conducted the interviews
myself (Maxwell, 2013). In order to attend to this issue, I hired an external interviewer (with
training in qualitative research), to conduct the teacher and administrator interviews (Alm, 2017).
The interviewer I selected had a CITI certificate that authorizes her to conduct research. She
completed a Master’s degree in Public Administration from NYU. She works in higher education
to support doctoral students in nursing education. We met on multiple occasions to discuss this
study, including the bodies of literature that have informed this study. We reviewed the protocols
together extensively, and she was approved by IRB prior to conducting interviews.

**Scheduling**

In order to best accommodate everyone’s schedules, the interviews took place digitally
(i.e., through Skype, FaceTime, or over the phone). I shared copies of the interview protocols
with participants via email one week beforehand, so that the participants have time to reflect, prepare, and ask questions prior to the interview.

**DILI Completer Interview #1**

I organized the interview process so that the first 60-minute teacher interviews took place during the summer of 2019, after the completion of the third year of the DILI program. The entire first round of interviews with 13 teachers was completed before any of the second round of interviews took place. This allowed me to use my initial learnings from the first round to inform the second round of interviews – in the form of probes and/or clarifying questions at the beginning of the second interview (Appendices B and C).

**DILI Completer Interview #2**

My interviewer scheduled the second interview at the end of each first interview – allowing around four weeks between interviews for the return of transcripts and data analysis. This included my writing of preliminary findings and creating participant-by-participant questions and probes for follow up. The interviewer and I met weekly to review the interviews and address all relevant materials and clarifications. The second interviews were also based on a semi-structured interview protocol (Appendix C) and allowed for follow up to address key findings and questions (Kvale, 2003). At their start, she reviewed my shared preliminary learnings to check interpretations (Creswell, 2012; Maxwell, 2013). Most often participants elaborated on the summary and delved further into the topic at hand during these member checks.

**DILI Non-Completer Interview**

As mentioned above, I believed that the three participants who opted not to continue with the program provided valuable insight about how to support teacher leadership. Three teachers
who partially completed the DILI had the opportunity to discuss their experience, the challenges they faced, and what made them opt out of continuing the DILI. These 60-minute interviews (Appendix D) took place during the same time period as the first round of full DILI teacher interviews (i.e., August, 2019). This proved useful, particularly in my analysis of the role of the holding environment and the need for ongoing support from the cohort teammates and administrators to be able to transfer their learnings (see Chapter VI).

**DILI Administrator Interviews**

The administrator interviews also took place during the summer of 2019. The administrators had the opportunity to discuss their experience in the DILI, and to identify how, if at all, they believe that it influenced the teachers they supervised. I paid particular attention to any explanations of the teachers transferring this their learnings to their work in their schools. This interview protocol was also semi-structured, so that what I learn from the teachers may inform my protocol in the form of probes or revised questions (Appendices E and F).

**Data Analysis**

In this section, I describe the methods I employed for data analysis. I used a systemic process with specific steps (Creswell, 2007; Maxwell, 2013). As I describe in greater detail below, my data analysis included multiple steps.

2. Survey data analysis (Popeil, 2010)
3. Transcribing and reviewing interviews (Maxwell, 2013; Seidman, 2013).
4. Coding (Creswell, 2014; Maxwell, 2013; Miles et al., 2014).
5. Categorizing the data across themes (Miles et al., 2014).
6. Writing narrative summaries of participants (Maxwell, 2013; Seidman, 2013).
7. Using data displays, matrices, and tables to display analyzed themes (Maxwell, 2013; Miles et al., 2014; Seidman, 2013).

8. Writing and revising my final dissertation.

Because this has been an iterative process, I did not simply rush through these steps in a linear fashion. Rather, at times I would move back to earlier stages to revisit that thinking and try again. In other words, my final step (i.e., writing and revising this manuscript) led me back to earlier steps repeatedly.

**Writing Analytic Memos**

As I collected my three types of data (i.e., survey, teacher and administrator interviews), I summarized my reflections by writing analytic memos (Creswell, 2014; Maxwell, 2013). I journaled throughout the data collection and analysis processes, including during the analysis of the survey, upon the completion of each interview, and I wrote about my initial impressions and patterns, as I tried to work from emerging themes (e.g., challenges or supports for teacher leaders) to my findings and implications. For example, when I noticed that administrators spoke of the teachers whom they felt took on the most leadership responsibility, they also spoke of partners who worked together to support each other in overcoming resistance. I began to develop my thinking that the support of the cohort was important for learning and for transfer. I returned to my data and identified how other teachers and administrators had also mentioned these “partners” and the way the cohort continued to provide support to each other. This eventually led me to my first finding which centered on the support of the holding environment during the DILI and when assuming a leadership role (See Chapter VI). Throughout this process I also made connections to my research questions (Maxwell, 2013).
I found that engaging in analytic memo writing made me more aware of my own biases, as well as the assumptions and judgments I brought to the interpretation process (Creswell, 2014; Maxwell, 2013; Peshkin, 2001). For example, while I thought that the cohort was important for providing support, I did not recognize that an important part of the support was the friendships they assumed and that these friendships helped make them feel less isolated, less stressed, and more included in the district as a whole. As the facilitator I was blind to how these relationships continued beyond the DILI. My memos were important in seeing the data without my own interpretation.

**Survey Data Analysis**

My analysis of survey data was designed to inform my third research question, *What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their greatest work-related challenges, both in general and particularly around managing workload, collaboration, and teaming?* I based my plan for analyzing the survey data on Popeil’s (2010) approach to her survey data. First, I analyzed responses on a numerical scale and noted the total number of responses and percentages of each of the six Likert questions (Boone & Boone, 2012). Second, I analyzed the open-ended responses and looked for similarities and differences between respondents who participated in DILI and those who did not participate, within each category, (e.g., managing workload, collaboration, and teaming). I had planned a third step, analyzing responses by demographics in order to look for trends among what was named as *challenges*, by various demographic factors – such as age, years of experience, and grade level taught (Maxwell, 2013; Yin, 2014). However, I found that so few participants filled out the optional demographic part of the questionnaire that this was impractical and inconclusive.
Transcribing and Reviewing Interviews

The third step of my analysis process addressed interviews with all the teachers and administrators who participated in the DILI. Each interview was digitally recorded and transcribed verbatim (Creswell, 2014). Upon receiving the recording from the interviewer, I electronically secured the encrypted file under a pseudonym to protect the confidentiality of the participants. Next, I used Rev (https://www.rev.com) to transcribe the interview and saved the returned file under the pseudonym, so that only the interviewer and myself knew the identity of the participants.

In order to attend to descriptive validity, I verified the accuracy of the participants’ words in a two-part process. First, immediately following the transcription of each interview, I listened to the interview recording and compared it to the audio recording to verify the accuracy of the transcript (Creswell, 2007; Maxwell, 2013). Second, I shared transcripts with the participants, so they could verify the accuracy of their words. I deleted anything that was not correct. As mentioned earlier, upon learning about the discomfort of participants with the verbatim transcripts, I began to edit the new transcripts to make the syntax look more typical of formal writing rather than an informal conversation (i.e., remove the ‘ums’).

Following my initial analysis of the interview data, each participant had an opportunity to confirm or refute my interpretation of what they had said, through member checking (Drago-Severson, 2018, personal conversation; Maxwell, 2013). The 13 full participants reviewed my interpretations of their first interviews as a warm up during their second interviews. Participants did this for their final interviews (i.e., the second full participant teacher interviews, administrator interviews, and non-completer interviews) during a scheduled follow up phone call with the external interviewer.
As recommended by Maxwell (2013), Miles et al. (2014), and Creswell (2014), as I listened to and corrected the interview transcripts, I was engaging in my initial data analysis review. As mentioned above, as I listened to the recordings and reviewed the transcripts, I wrote analytic memos to capture my initial impressions and identify emerging themes. For example, I made note of tone of voice for what seemed to be of greatest importance to the participant. I tried to identify what they spoke about the most, and what they named as most meaningful. As I did this I also noted any additions that I needed to make to my code list (Appendix R) setting me up for my next phase of analysis: coding (Creswell, 2014; Maxwell, 2013).

**Coding**

The next step in my data analysis consisted of coding both the open-ended survey answers and transcripts from the first round of interviews for concepts related to my four research questions. “The process of noting what is interesting, labeling it, and putting it into appropriate files is called coding” (Seidman, 2013, p. 125). Having already inductively developed additional codes based on my initial review of the interview transcripts and survey responses (e.g., emic codes), I engaged in my first round of coding. I then used theoretical codes (Appendix R) from my conceptual framework and research questions (e.g. ‘way of knowing’, ‘adaptive challenge’, ‘teaming’, ‘leadership role’). To assist in this process, I utilized a qualitative data analysis software package (i.e., Nvivo).

Throughout, I utilized my memos to capture my evolving understanding of the emerging themes. This led me to revise my code list/book –combining like codes, dividing codes, and/or adding additional codes. For example, I had originally thought assuming a leadership role would be a code. As I refined and merged my codes I recognized that this was one example of a larger category of *transfer*. 
With my refined coding scheme, I then engaged in a second round of coding. This allowed me to apply a consistent set of codes to the data. As noted above (see Data Collection), my emerging understanding from analyzing the first round of interviews informed my second round of interviews. Once my interviewer completed the second round of interviews, I repeated the coding process to analyze the second set of interviews as well.

Of course, I paid special attention to discrepant data that stood out from my developing understanding (Creswell, 2014; Maxwell, 2013; Miles et al., 2014). For example, I noticed that all of the full DILI participants spoke extensively about the importance of the support of having others on their team back in their schools when they tried to introduce developmentally intentional teaming protocols (Drago-Severson, 2004a, 2009a, 2012a, 2016a). This eventually led me to notice that none of the non-completers mentioned this support and I realized that at the time each non-completer dropped out of the DILI, none of them had a fellow DILI cohort member on their team at their school. Thus, the discrepant data contributed to an important finding in my study (see Chapter VI for a full description).

Finally, during a dissertation seminar class in the fall of 2019, I asked my fellow doctoral students to review and code transcript segments in order to crosscheck my codes and to help me think about interpretive validity (Maxwell, 2013).

**Categorizing the Data Across Themes**

In this phase of my data analysis, I clustered similar codes into larger categories that helped me to answer my research questions and identify patterns (Drago-Severson, 2019, personal conversation). I reviewed the data to examine which patterns and categories were robustly supported, and labeled them as emerging themes. I further examined the emerging
themes to see if they developed and were supported across multiple participants and sources of data (Maxwell 2013; Merriam, 1988).

One such example was Leading as a Teacher. This category included various viewpoints that centered on how teachers described themselves as a leader (e.g., “a shifting definition of leadership that isn’t just a principal” and “leadership actions they took to act as a leader on their teams, and throughout the school or district”). I reviewed my earlier analytic memos and code list and saw that – throughout the process – the participants had multiple shifts in perspective — including how they defined leadership and came to view themselves as leaders. Thus, this code was refined and became part of a category, which grew to be so robust through cross case comparisons it became part of a finding of this study (see Chapter VII).

**Narrative Summaries and Narrative Profiles**

In order to summarize the analyzed data and potential findings I contextualized the data by developing narrative summaries and vignettes for each participant. By creating a narrative profile for each teacher leader and administrator, I was able to better understand the participants’ interviews, and made connections between participants (Seidman, 2013). Upon the completion of the interviews, I crafted analytic questions and created a holistic profile by writing in first person, blending direct quotes, and using my own analysis to interpret, and share the data from individual interviews (Seidman, 2013). This helped me to develop findings, expand my thinking, and determine the most important findings. I used narrative profiles to share my learning in a format that tells the story of the participants (Locke et al., 2014; Seidman, 2013).

I also created vignettes for each participant in order to provide a shorter summary of the participants’ history and experience as a teacher-leader as the basis for Chapter IV. I crafted a narrative that synthesized the main points of the storyline (Miller & Rollnick, 1991). These
narrative summaries captured a few pertinent highlights and provided a mix of direct quotes and my interpretations to guide readers. For example, I built a narrative summary about Gabriella who described the way she would not speak even though she “knew damn well” about best practices and research. I concluded with her describing how she found her voice and even found it “kind of fun” to speak up as a way to share Gabriella’s story and development as a teacher leader.

By analyzing interview data in the form of both profiles and vignettes, I was be able to highlight connecting threads and patterns across multiple excerpts and data points. These summaries and vignettes helped me to bring the respondents’ words and views to my readers in a way that better captured the fuller and deeper meaning of my participants’ words. This process of making connections across multiple categories helped me to uncover themes in the data (Seidman, 2013, p. 125). One example is the theme of reduced stress. It was not until my final cycle of coding that I realized that the stories of how the teacher leaders used their learnings in their teaching and leadership practice led to this theme. I realized that they spoke of ways they felt they could “get more done” or “handle more” which led to a critical component of my third finding (See Chapter VIII).

Data Displays

As I crafted summaries, vignettes, and engaged in analytic memo writing I created visual displays and matrices to organize, compare, and contrast themes across individual and multiple sources of data (Creswell, 2014; Maxwell, 2013; Miles et al., 2014). I organized these displays to help make thematic connections that structured the findings of the study. The data displays were helpful in noting how different data and themes appeared across the participant pool and resulted in findings and cross text analysis.
Validity

In this section, I identify validity threats in my research design, including researcher bias and reactivity. I then describe possible threats to interpretation, including: descriptive, interpretive, and theoretical validity (Creswell, 2014; Maxwell, 2013; Miles et al., 2014). Finally, I explain how I addressed these threats in my study.

Researcher Bias

Researcher bias and subjectivity influence what a researcher studies, and how he or she interprets what they see (Maxwell, 2013). As mentioned above, my history in the MELC school district (i.e., as an administrator and the facilitator of the DILI) has presented a strong commitment to learning how to support teacher leadership. This very commitment also had presented a real validity threat to this research (Maxwell, 2013).

I understand that my own personal investment in this program, the commitments I have as a person, and my beliefs about the value of Learning-Oriented Leadership – however well grounded – all present issues related to researcher bias in this study that I attended to very carefully. My research bias had stemmed from many sources, including being the designer of the DILI, having professional relationships with participants, and being employed by the district. Additionally, I believe that a developmental approach and Learning-Oriented Leadership has the potential to support leadership. Therefore, I took great precautions to ensure I was constantly aware of my own biases, assumptions, and judgments. These precautions included three major steps.

1. I wrote analytic memos to document my thinking and reflect on my interpretations and stance as a researcher (Creswell, 2014; Maxwell, 2013; Peshkin, 2001). Analytic memos helped me address researcher bias by providing an opportunity for me to reflect on my
own feelings and initial reaction to the data (as a former teacher leader, the facilitator of
the DILI, and current administrator) as a way to check my own assumptions throughout
the research process. These memos also cataloged my evolving thinking and
interpretations of the data over the course of the study.

2. I attended to theoretical validity and sought discrepant data that surprised me and/or did
not fit with emerging trends and themes (Creswell, 2014; Holloway & Wheeler, 2010;
Maxwell, 2013; Miles et al., 2014). For example, like two administrators in my study, I
was surprised that so many teachers “needed the comradery” of the cohort and reported
that “it had given them friends” and that – for some – they were “lonely” before the DILI.
This addressed researcher bias because I viewed the data through a lens that purposefully
sought disconfirming evidence that disproved my own theories and pushed me to ask my

3. I checked my findings with my sponsor and with fellow doctoral students in my classes
who were trained in qualitative research as well as two other doctoral graduates from
Teachers College who were trained in quantitative and qualitative research (Maxwell,
2013). Cross checking my findings helped to address my researcher bias because it
helped prevent me from forcing the data to fit my pre-conceived notions or theories
(Maxwell, 2013).

Reactivity

The second validity threat to my study was reactivity. Maxwell (2013) describes
reactivity as the influence of the researcher on the participants of the study, and notes that it is
critical for researchers to understand the influence their identity and position can have on a study.
As a qualitative researcher, I know that I cannot remove my influence from the study, and that I
have the power to influence the participants in this study. Therefore, it has been important for me to understand my influence on the study (Maxwell, 2013).

I serve in multiple roles for the participants. First, I am an employee in the district (i.e., as the facilitator of the DILI) an administrator who conducts evaluations for the teachers, and a colleague for the administrators in this study). Second, I am a researcher who sought to study the experience of the teachers and administrators who participated in the DILI for my dissertation. I have relationships with each of the participants, and therefore it was of the utmost importance that this did not hold back participants’ ability to be honest in their interviews. I took purposeful steps to understand how my role influenced the investigation and incorporated two strategies to address these concerns (Maxwell, 2013).

First, I followed formal procedures to use reactivity in a way that supported the outcomes of my proposed study (Maxwell, 2013). For example, I met with potential participants at a DILI team meeting in June, 2019 to introduce this research project and my interest in learning from the participants’ authentic experience. I verbally assured participants that their choice to participate or not would not influence any future evaluations, and that their sharing of negative feedback would be helpful to me in learning more about how to best support teacher leaders. I made it clear to participants that I was inviting them to participate because I wanted to learn from their unique perspective and experience in the DILI, and that their participation was voluntary (i.e., it was not be required, in any way). Also, during this time I explained that my intent with this research was to inform policy makers about what it is like to be a teacher leader, using the teachers’ words and experience about what is supportive and not supportive. Rather than letting them think that they were being kind to me by omitting complaints and criticisms I used my preexisting rapport with participants to ask them to share their truthful and heartfelt reactions in
their interviews with the researcher who conducted them, assuring them that there could not be any wrong answers. I also assured participants that I would do all I could to protect their confidentiality. In adherence to IRB requirements, those who agreed to participate received an informed consent form that described the risks and measures of confidentiality, including how the description of the site, the use of pseudonyms, and digital encryption for file storage would be used to provide anonymity, (Appendices N, O, and P). In sum, only the interviewer and myself knew their identities.

Second, I addressed reactivity during the interviews, themselves. I utilized a third party to conduct the actual interviews so that participants might feel more comfortable being honest about their experience. I thought that perhaps they might be a bit more comfortable being critical if they did not have to do it to my face. The external interviewer also presented issues of reactivity because she was an outsider. Therefore, in order to create trust and allow participants to feel comfortable with her, she shared her background and role in the research as a way to establish credibility before diving into asking questions. She also reminded participants about the way she and I worked together to communicate, so that participants might feel more comfortable with all steps in the research process. Furthermore, she specifically asked participants if and how their responses might have differed if I (the program facilitator) were not connected to the research. This invited participants to describe how, if at all, my role influenced their responses. This may have proved correct as one participant complained about the time spent on reflection, and another said that they were not sure how my role influenced them but they were sure that knowing me may have subconsciously contributed to their responses.
**Descriptive Validity**

Descriptive validity is the accuracy of what is recorded as actually representing what happened (Maxwell, 2013). With interview-based research, this addresses the accuracy of the interview transcripts. In order to ensure that participants’ experiences and voices are accurately represented, all interviews were digitally recorded and transcribed verbatim (Creswell, 2012; Maxwell, 2013). I checked the transcripts against the interview recordings myself to ensure accuracy, (Maxwell, 2013). I also gave participants the opportunity to review their transcripts to check for accuracy (Creswell, 2007; Maxwell, 2013; Seidman, 2013). These steps helped to address descriptive validity through the use of multiple measures to accurately capture the words of the participants.

**Interpretive Validity**

Interpretive validity is concerned with the accuracy of researchers’ interpretation of participant viewpoints, thoughts, and experiences so that they are correctly understood and reported (Maxwell, 2013). In order to attend to this, I took three precautions.

First, the participants engaged in member checks during either the second interview and/or a follow up phone call (Maxwell, 2013). According to Maxwell, this is the most important way to precaution against misinterpreting the meaning of what participants say. Second, as mentioned above I wrote narrative summaries and vignettes to create thick descriptions and convey findings (Creswell, 2014). Third, I asked other doctoral students with qualitative training to assist in coding, which allowed me to cross check my analysis with a group of fellow researchers and established inter-rater reliability (Creswell, 2014; Maxwell, 2013; Siedman, 2013). These steps aided in addressing interpretive validity with interpretations that reflect a final understanding that is consistent with multiple people, including the participants, and additional
coders—including classmates in my research seminar, my advisor, my dissertation coach, and colleagues in my PhD cohort.

**Theoretical Validity**

Theoretical or methodological validity “Goes beyond concrete description and interpretation and explicitly addresses the theoretical constructions that the researcher brings to, or develops during the study” (Maxwell, 2013, p. 50). Yin (2014) suggests that when utilizing a case study research design, it is critical to attend to theoretical validity throughout the design of the case study, as well as during the data analysis process. I addressed this issue as I looked for discrepant data in order to attend to my own biased subjectivity (Locke et al., 2004; Maxwell, 2013; Seidman, 2013). For example, I chose to first code based on the participants’ words so that I could be responsive to the revelations of the data as a way to work beyond my assumptions (Saldaña, 2016). Further, rather than only look for evidence that confirmed my initial hypotheses, I looked for both affirming and contrary explanations of the data hypotheses (Maxwell, 2013; Miles et al., 2014; Yin, 2014). This attended to theoretical validity because it helped me determine whether I was making correct sense of the patterns, and aided in providing an accurate and complete picture of the experience of participants (Miles et al., 2014; Yin, 2014). Finally, in a research class I shared data with doctoral students and invited them to collectively code and interpret the data. This allowed me to bring out potential ideas that were outside of my presumptions and the literature to address interpretive validity (Creswell, 2013; Maxwell, 2013).

This issue was, perhaps, most pertinent with a finding that I did not stick with and write up, instead only offering it as a possibility hinted at in my data (see Chapter IX). I believe that the DILI actually helped some participants to engage in transformational learning. However, I realized that I could not make this claim. First, I did not conduct developmental assessments to
determine any kind of measurable growth in a person’s way of knowing from start to end of the DILI (i.e., conduct subject-object interviews). Second, I could not rule out an alternative explanation (i.e., that participants were equipped by the DILI with a variety of developmentally intentional supports, tools, and protocols that enabled them to engage in certain kinds leadership work without developmental growth). Perhaps it is the former explanation and perhaps it is the latter. Or perhaps it is some combination of the two. I realized that with the data I had from this study, I could not distinguish between the two. Therefore, my care for theoretical validity kept me from pursuing this potential finding further.

Chapter Summary

The purpose of my qualitative case study was to learn from the experience of 13 teachers who formally engaged in a three-year developmentally intentional institute centered around the Learning-Oriented Leadership model, and to understand how, if at all, the training influenced their leadership practice as informal teacher leaders.

In this chapter, I have presented my research questions and a rationale for why I chose a qualitative methodology. I described the unique research site, and my dual role. I also explained how this guided my site and participant selection. I then detailed my plans for data collection through a survey, interviews, and a document review. I explained my steps for analyzing data. As mentioned throughout this chapter I have used research-based strategies to structure the research design plan of this study.
CHAPTER IV: RESEARCH SETTING AND PARTICIPANTS

In this chapter I provide the context for my case study by describing the setting and participants at the heart of my research (Yin, 2014). I begin by offering a brief overview of the setting and the DILI to provide information about the context of this study and of the experience described by participants’. In the second part of this chapter, I describe the participants, presented in three categories:

- The 13 teacher leaders who participated in the full three-year DILI.
- The three teachers who participated in 1-2 years of the DILI.
- The six administrators (including three district level administrators and three building principals) who participated alongside their teachers.

In the subsequent chapters, (i.e., Chapters V-VIII), I present my findings.

The Setting

In this section, I provide a reminder and brief overview of the research site and the DILI at the center of this project, in order to contextualize the stories and vignettes that follow. For a full description, including the rationale as to what led me to choose this research site, please see Chapter III.

The MELC School District

The MELC School District is a suburban public-school district approximately 20 miles from a major U.S. city in the northeast. It serves students in kindergarten through eighth grade. There are three schools in the district.

- A kindergarten — second grade school.
• A third — fifth grade school.
• A sixth — eighth grade school.

Together, these schools enroll nearly 1,000 students and employ 90 classroom teachers, three building principals, and three other administrators with supervisory responsibilities. However, the principals are the only administrators in each school (i.e., there are no assistant principals in the district). The central office administrators include the superintendent, the business administrator, and two curriculum supervisors. The MELC school district is not a Title I (i.e., high poverty) district. In fact, it is classified as a relatively wealthy district within its home state. However, in 2016 when the DILI began it was clearly underperforming in comparison to its economic peers and neighboring districts on state assessments. However, over the course of the three years of the DILI the MELC’s school district’s performance on standardized tests relative to its peers improved.

MELC’s Developmentally Intentional Leadership Institute (DILI)

As part of my responsibilities as the curriculum supervisor in the MELC school district, I worked with Dr. Ellie Drago-Severson (Teachers College, Columbia University) to create a developmentally intentional leadership institute (DILI) with three main goals for its aspiring, informal teacher leaders:


3) Apply learnings to a self-chosen topic of interest in assuming an individually selected leadership role.
These goals drove the formation of the three-year DILI for teachers who volunteered to participate in the program.

The DILI in this study was a longitudinal developmentally intentional form of professional learning designed to grow leadership capacity in a cohort of 16 informal teacher leaders. The cohort of participants – which included both the teacher leaders and six administrators – met for a total of 90 hours of professional learning over a three-year period. During this time, participants learned about principles of Learning-Oriented Leadership – which is composed of four Pillar Practices (i.e., teaming, collegial inquiry, leadership roles, and mentoring). Participants both learned about and experienced these Pillar Practices as they engaged in developmentally intentional activities in the DILI. The longitudinal three-year approach worked with a cohort structure to contribute to a holding environment (Drago-Severson, 2004b, 2009, 2012a, 2016b; Kegan 1994, 200; Winnicott, 1965) so that participants felt supported as they were challenged to take risks, engage in critical conversations, discuss their challenges, reflect on their assumptions, and work together to practice informal leadership.

The goal of this DILI was to support informal teacher leaders in assuming leadership responsibilities with the hope of developing their own capacities while also learning practical ways to support other adults – whether that was by leading their teams, facilitating professional development, or collaborating with others.

The Participants

In this section, I introduce the three sets of participants for my dissertation study. The 13 aspiring teacher leaders who participated in the full three-year DILI were the first set of participants. The second set of participants included three non-completers (i.e., three teachers who each completed just 1-2 years of the DILI). The third set of participants was comprised of
the administrators – including both the three district administrators and the three school principals.

For each set of participants, I first describe them demographically. I then share the participants’ stories in the form of shortened narratives, or vignettes. Seidman (2013) stressed that the “power of the profile is that it is presented in the words of the participant” (p. 123). The following vignettes (or abbreviated summaries) use the participants’ words and include their demographics, their journey as a teacher, the challenges they report as teacher leaders, and how they describe their teacher leadership today (i.e. after participating in the DILI; Seidman, 2013). I have added my narration to the words of the participants to assist in sharing their stories of teacher leadership (Miles et al., 2014). As mentioned in Chapter I, while I use the term DILI to refer to the three year developmentally intentional learning institute, participants adopted the name cohort. Thus, the terms DILI and cohort are used interchangeably throughout the vignettes.

I offer the narrative profiles, in alignment with my interview protocols and in partial response to my third research question [i.e., What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their most important work-related challenges, both in general and particularly around managing workload, collaboration, and teaming]. All the names I use are pseudonyms to protect the confidentiality of the participants.

**DILI Completers**

All 13 DILI completers were white and female. Their classroom experience ranged from 5 to 31 years. Their ages varied from 31 to 57 years old. On average, the teachers in this study had 13 years of teaching experience. The average age was 45 years old. In comparison to national demographics, a 2016 demographic poll of 40,000 American public-school teachers by
the National Center for Education Statistics reveals that the average teacher is 42 years old and has 14 years of experience. Seventy-seven percent of public-school teachers are female and 80% are white (Taie & Goldring, 2017). Thus, while the DILI completers are of similar demographics to a typical teacher, as a group they too lack the diversity reflective of the American teaching force. I would have preferred a more diverse group for my study, but no teachers of color volunteered to participate in the three-year DILI. This lack of diversity among the participants is one of the limitations of my study.

Table 7 shows the demographic data and years of experience for the first set of participants, the DILI completers.

**Table 7**

*Demographics of DILI Completers*

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Race/Ethnicity</th>
<th>Total Years of Exp.</th>
<th>Age</th>
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<td>15-20</td>
<td>50s</td>
</tr>
<tr>
<td>Cathy</td>
<td>F</td>
<td>White</td>
<td>20+</td>
<td>50s</td>
</tr>
<tr>
<td>Edith</td>
<td>F</td>
<td>White</td>
<td>5-10</td>
<td>30s</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>F</td>
<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
<tr>
<td>Emma</td>
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<td>White</td>
<td>15-20</td>
<td>40s</td>
</tr>
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<td>Fatima</td>
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<td>50s</td>
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<tr>
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<td>30s</td>
</tr>
<tr>
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<td>40s</td>
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</tbody>
</table>
Participant Vignettes

Angelica: “I Learned to Find Joy.”

[I realize that] my opinion and feelings are just as important as someone else’s. Before I was afraid that if I said something, somebody would think it was stupid and not worthy. Before I would’ve not spoken and now I speak.

Angelica was a teacher in her 50s who had been working in the profession for more than 15 years.

Journey to Becoming a Teacher Leader. Angelica’s first career was in the business industry and she changed her career to become a teacher. As a working mother, she recognized that she was spending a great deal of time without her children and became a teacher to “create a better balance” in her life.

The Challenges of Teacher Leadership. Angelica shared that when she started participating in the DILI, she was going through a particularly difficult time in her life. She described how she was on the verge of “making herself sick” because she was so stressed. Both professionally and personally, “I just didn’t enjoy people and always felt animosity.” Although she was a member of her church choir for more than four decades, she was considering quitting this beloved hobby in an attempt to find joy again. Angelica described that she joined the DILI to “figure out a way to deal with people better because… something was going to happen.” By engaging in the reflective and developmentally intentional exercises, Angelica recognized the source of her stress.

I realized I needed to tell people how I was feeling. I couldn’t hold it all in. When I looked back on it, it wasn’t just the way other people behaved. It was probably a lot of the way I was feeling and the way I was presenting that was creating this tension with other people.
Angelica recognized that her fear of what others would think if she shared her thoughts led her to “hold it all in.” She further described recognizing and working through this challenge in her first two years in the DILI:

[It was] a difficult [time for me] … [but by] the second year, I was so happy to go to cohort [DILI]. It was a break from the ever-present stress that I felt in my job and that was spilling over into my personal life. I appreciated having the cohort as a safe place, and having the teachers from the other schools to learn and connect with…[It] made me feel more part of the whole community.

**Angelica’s Teacher Leadership Today.** At the time of her interview, Angelica described learning about *developmental diversity* and the *ways of knowing* as a way to understand and collaborate more effectively with others. “Changing my perspective, it [helped me realize that] maybe my way [of doing something] wasn’t always the right way.” In her practice as a teacher leader today, she works to understand others’ points of view by trying, “To see everybody as an individual and to keep an open mind.” She said that she had a new ability to be flexible which had “helped a lot when working with colleagues, administrators, students, and family members.” She reflected on these improved relationships and described how she found balance between her work and the rest of her life, and noted that she was able to continue being part of her church choir. As she “found joy again in the things I could no longer find joy in.”

Angelica summarized her experience by describing how learning to keep an open mind has influenced the way others view her:

I’m taken more seriously because I am not defensive and I’m more introspective… [I’ve learned] to become more flexible and that there’s not just one way to do something… It’s made me a better teacher and a better wife and a better mother and a better daughter and just a better person overall.

**Cathy: “I Listen.”**

Leadership has helped me to be able to talk to people and in a way that I wasn’t able to do – prior to leadership – and then have those critical conversations and overcome those challenges.
Cathy was a teacher in her 50s who had been working in the profession for more than 30 years at the time of her interview. 

**Journey to Becoming a Teacher Leader.** Cathy was one of the most experienced participants in this study. She became a teacher right out of college and has worked in multiple grade levels over the course of her tenure. She has been a teacher within the MELC school district for more than a decade. 

**The Challenges of Teacher Leadership.** Cathy said that prior to the DILI it was hard for her to have productive and respectful conversations. She said that three years previously, she “...didn’t have the tools I needed to have difficult conversations or would have been able to establish lines of respect among teams and team meetings.” Through the developmental exercises of the DILI she realized she was not always listening and instead would sometimes jump to assumptions. She described how the DILI helped her change her approach when engaging in conversations. 

I would have interjected my opinion a little bit too strongly, and now I listen before responding. It’s very helpful, it gives me a better chance to digest everything. I’ve become a better listener. 

**Cathy’s Teacher Leadership Today.** While participating in the DILI Cathy was on a team with two other members of the DILI cohort. She described how important this was for her when she was transferring ideas from the DILI to her practice as a teacher leader over the course of her three years in the DILI. 

Having other people who’ve been in the cohort offers support in many ways. Because you speak the same language and, if you have to have a difficult conversation, they can support you with what we’re all trying to do. It is very helpful because someone has your back. And it helps to push through those difficult moments when working together. 

Collectively with her two teammates, Cathy introduced new protocols, such as implementing surveys, having an agenda, and establishing norms, check-ins, and a parking lot (i.e., a place
where people could put something they wanted to say so they did not interrupt a meeting) as a way to support her team. She said that they worked together to create “a safe environment that everyone feels good about, so that people can feel comfortable working with their team to share their ideas.” She described these protocols and her intentionality in creating a safe space during team meetings as resulting in more productive meetings and more effective collaboration. Cathy also worked with other members of the cohort to take new steps as a teacher leader. She pushed herself to partner with other teammates to write curriculum for the district and to lead professional development. She credited learning about ways of knowing and her new approach to listening as the main learnings from the DILI that helped her in her new leadership roles.

Cathy summarized her DILI experience by saying, “Before, I wouldn’t have done it [assumed a leadership role], but now I will.”

**Edith:** “I Had to Have Confidence First.”

I learned how to put myself first because then I would be better able to serve my colleagues and my students. I think when you learn about yourself then you can help others and be better.

Edith was a teacher, a little over 30 years old, who had been working in the profession for more than 5 years.

**Journey to Becoming a Teacher Leader.** Edith said that she loves being around children and that comes from her family full of teachers whom she always looked up to. She had been a teacher within the MELC school district for over 5 years.

**The Challenges of Teacher Leadership.** Edith said that three years prior to the DILI, she was a “younger teacher” who was placed on the team in the school that, “no one wanted to be on.” She described the team as one where, “There were a lot of difficulties and everyone talked behind each other’s backs.” Edith wanted to make her team better and her teammates “not
hate each other and get along.” There was high amount of turnover on the team, with at least one new team member every year. Edith signed up to be team leader, but spoke of how she did not have the tools to know what to do. She felt that because she was a younger teacher, she was not always listened to. She said, “I would share my thoughts, but because I was a little shaky and younger than my teammates I didn’t have any knowledge or authority and they didn’t always hear me.”

**Edith’s Teacher Leadership Today.** Over the course of her three years in the DILI Edith reached out to her fellow members of the cohort for support. She asked me, the facilitator of the DILI, to join her in a team meeting and introduce norms. After that meeting she would meet frequently with other DILI team members to plan how to implement teaming strategies (e.g., having an agenda and check-ins). Edith would check in with me, but did so less frequently over time. She started to work more with other members of the cohort, including visiting other’s team meetings and working with her grade level partner to improve their team. She was especially proud of how her team started to celebrate successes together:

   Every month, I would attend the cohort and learn something new about how to approach my team, and I would be more confident in what I was saying, and they saw more confidence in me. I realized it’s important to have confidence in yourself first, and then other people will be confident in you.

Edith also credited her confidence with helping her as by the third year she was able to do new things such as have difficult conversations, delegate work, and not take everything on herself. In addition to gained confidence, Edith also started to do less. She said that during the developmental exercises of the DILI she realized, “I can’t do everything people ask me to do. And it was difficult for me to say “no” because I was trying to please everyone.”
Edith summarized her three-year DILI experience by saying, “I feel more confident as a leader in the district and I learned a lot about teaming. I just want to keep being a team leader and making my team go from good to great.”

**Elizabeth: “I Learned I Have a Voice.”**

[In the past] I probably would have gone along with the pack…and just avoided any kind of conflict. Now I have the ability to speak up and give my opinion or insight. I’ve learned I have a voice and now [I] am comfortable sharing something that I love with the people I work with.

Elizabeth was a teacher, a little over 40 who had been working in the profession for more than 15 years.

**Journey to Becoming a Teacher Leader.** Elizabeth started her career in business. However, having two parents who were teachers, she found herself shifting her career plans to “follow their path” and returned to school to become a teacher. She taught for over 5 years before taking time off to have her children, and had been in the MELC school district for more than 10 years at the time of this study.

**The Challenges of Teacher Leadership.** Elizabeth shared that after her three years in the DILI she was better able to advocate for her students and could collaborate with other teachers, support staff, and parents about her students’ needs. She reflected that this was a critical component of her work as a teacher, and that it had previously been her greatest challenge. Elizabeth named avoiding conflicts, collaboration, and difficult conversations as the biggest challenges she faced prior to her participation in the DILI.

In the past, I would’ve totally avoided any kind of conflict at all. This was tricky [because part of my job is] trying to get students services and helping parents understand their children’s needs. It’s a sensitive topic. I have to bring a parent in and let them know that, [their child isn’t making progress]. [And in the school, I also have to advocate to] the child study team and administrators for students who might need some special education services.
Elizabeth’s fear of conflict had resulted in her not always sharing her opinion, and continuously avoiding collaborating with others – even if it meant assuming a greater workload. Her large workload and lack of input in decisions often resulted in feelings of frustration:

In the past I just did everything and said, “Yes,” to everything. I would just take it on and do it instead of really working with others…It was just easier to do it [myself] than to possibly get into some sort of confrontation. So, I would say, “I’ll do that.” “Oh, I’ll do that part too.” [The DILI] helped me understand that’s not always the best method…For me, that was the biggest change.

**Elizabeth’s Teacher Leadership Today.** Elizabeth noticed a shift in how she viewed the challenges of collaborating with others, confrontation, and taking a stance for what she believes in. She newly placed a high value on collaborating with others and has “learned she has a voice.” She described how she uses her voice and embraces collaboration, as a way to support her students, even if it might involve confrontation.

Elizabeth summarized her DILI experience by saying:

Before I would have avoided any kind of conflict at all. [Now,] I’ve found my voice and am able to have a critical conversation with someone. Before I would’ve hid, I would’ve avoided [a leadership role] at all costs. And now, even though it’s not completely in my comfort zone, I’m willing to try.

**Emma: “I Do Have Something to Offer.”**

I [now] have an awareness about creating environments where it could help support others’ development. Understanding how important trust, respect, and providing a safe space is, helped affirm my awareness of the importance of that, especially on a team.

Emma was a teacher in her forties who had been working in the profession for more than 15 years.

**Journey to Becoming a Teacher Leader.** Prior to becoming a teacher, Emma worked in business for almost 10 years and came to realize that she was not fulfilled in her old profession. She enjoyed teaching others in her job and thought she might like to teach in schools. After interviewing many of her friends who were teachers and visiting classrooms, Emma
pursued an alternate route program to gain her teaching certification. She had been a teacher within the MELC school district for over 5 years at the time of this study.

**The Challenges of Teacher Leadership.** Emma described feeling the stress of working in a district that was going through a tremendous amount of change, prior to her participation in the DILI. This included a new superintendent who wanted the teaching staff to improve their instructional practices and new content standards. Essentially, she was learning “a completely different way of teaching” and realized that she needed to improve her craft. She explained that although she and her colleagues knew this change was for the better, everyone felt pressure as they acclimated to the new dynamic, new curriculum, and shifted their pedagogical practice. Not only did Emma feel this stress herself, but her colleagues constantly brought their stress about these changes to her. Emma felt as though she would try to advocate for her beliefs in meetings, yet her ideas were sometimes dismissed without even being considered. She thought one reason was because her stance was not always popular. She described how having spent three years learning alongside administrators in the DILI, she would see the administrative perspective or rationale and would try to present it for consideration. She said that before she started the DILI, she struggled to be heard, but over time she began to feel, “More confident in speaking up.” Emma said, “I do have a point of view. I do have something to offer.”

**Emma’s Teacher Leadership Today.** At the time of her interview, Emma described herself – after having completed the DILI – as having a voice and being able to speak. She credited the safe learning environment of the DILI as the place where she first started to share her perspective. She also felt like the DILI had helped her understand what it meant to be part of a team. In school, she had been committed to creating a space and environment for her colleagues and students where they could also “find their voice.” She said that she utilized the
ways of knowing to recognize the different developmental capacities of the adults in her care and depersonalize resistance to her ideas. She works to tailor her approach to make others feel more comfortable and “build stronger relationships.” She shared that she tried to do this by bringing protocols (e.g., norms, agendas, surveys, and check-ins) to her team meetings and her classroom. She further described how her new knowledge of developmental diversity and creating holding environments for those in her care had allowed her to better support those around her. Emma summarized her experience by saying, “I feel more confident, and I have broken out of my shell a little bit.”

**Fatima: “Being a Leader Doesn’t Mean that I Have to Be Perfect.”**

I did not necessarily feel comfortable thinking I had something to contribute to helping my colleagues grow. After completing the DILI, I’ve definitely realized that not only can I learn from other people, but I have a lot to offer that I can help and teach others. I’ve learned that and it’s become part of what I do now.

**Journey to Becoming a Teacher Leader.** Since high school, Fatima wanted to be a teacher. However, she also wanted to pursue a career in business. She had worked in business and trained adults and she felt as though she “ended up in teaching despite myself.” She took a break from her career to raise her children. When they went to school, she started substitute teaching and eventually obtained her teaching certificate by attending classes at night. In her fifties, Fatima had been a teacher for more than a decade, all of it in the MELC school district.

**The Challenges of Teacher Leadership.** Fatima said that prior to the DILI, she did not have a voice in her shared classroom (i.e., co-teaching with non-special education teachers) or in her team meetings. She felt, “pigeonholed to the role [of a special education teacher]” and she didn’t have a say in decisions, as they were made “solely by the classroom teachers.” She felt the co-teaching classroom was not very collaborative; each teacher just did their own thing. Fatima said she always wanted to communicate that they were both there to collaborate together for the
learning of all students, but she never did say that because she wanted to avoid difficult conversations, for “fear of confrontation.” In team meetings, she also stayed on the sidelines.

I did not have much of a voice…Nobody wanted to hear from the special education teachers. The homeroom teachers would make the decisions. And then I would just say, “Okay.” Everybody did their thing and every once in a while, somebody would chime in. Before, I sat in the background and only spoke when absolutely necessary, and did not want to have the spotlight…to shine on me.

A second challenge for Fatima was vulnerability. Fatima said that she thought that if she worked with others it would be a sign of failure that she could not do something herself. She mentioned that in the DILI she learned over time how to collaborate with and to trust others. She explained, “I did not recognize the value of collaboration, teaming, and working with others as much as I appreciate it now.”

**Fatima’s Teacher Leadership Today.** Following the DILI, Fatima described her leadership as a practice in which she strives to support the development of other adults in her care. She mentors other teachers, including veteran teachers who struggle to meet new district expectations. She also facilitates collaboration during team meetings, implements protocols to make meetings more productive, and leads professional development. She said that she had stepped out of her comfort zone and was no longer afraid to speak up or have difficult conversations. She described this shift.

Learning that it really is something special to recognize people, and make people feel more comfortable, to build up their leadership capacity…or [supporting her colleagues in learning and growing] as a vital part of, whatever role I’m in whether I’m a formal administrator or a teacher.

Fatima said that she takes great pride in helping to transform her team to be more effective and collaborative. While she was not the team leader, she said that she meets with the team leader (who is also part of the DILI) to discuss strategies (e.g., surveys, check-ins, and norms) to improve their team meetings. She said that, as a result, their meetings had become more effective
and they use team meetings to plan together, to integrate technology, and work together to find resources to supplement instruction.

Fatima summarized her DILI experience by describing a shift in the way she sees herself. She had grown to see herself as “an equal among all teachers.” She also described herself as someone who is not afraid to be vulnerable, who values collaboration, is more confident, team oriented, and not afraid to share her opinions. This shift has also resulted in the way others see her, too.

I feel like I’m sought after and, people come to me and say, “What do you think?” And I’m part of that decision making, whether it’s within the classroom, the team, or across the building. I’ve broadened my participation [across the school] and I’m not just the special education teacher [they saw me as] before.

**Franny: “I'm Not Afraid to Be Vulnerable.”**

I am more confident in my leadership roles, before I was maybe tentative, maybe unsure. But I feel a sense of confidence about what I’m doing as a leader in my practice. As a leader, I feel much more confident and therefore more competent. So that definitely helped me to be more honest and vulnerable, but it’s also helped me to direct others better instead of wavering. I think it’s helped me to help others.

Franny was a teacher, in her 50s, who had been working in the profession for more than 15 years.

**Journey to Becoming a Teacher Leader.** Franny studied education in college and taught for a couple years before deciding to leave education for nearly 10 years and pursue a career in hospitality. She then spent 10 years as a full-time mother, gradually transitioning back into education by substitute teaching for a few years. She had worked at the MELC school district for over a decade at the time of this study.

**The Challenges of Teacher Leadership.** Franny said that prior to the DILI teaming was a significant challenge for her, especially in her role as a team leader who was left to deal with a particularly challenging team dynamic. One difficult person, whom Franny described as,
“unhappy and who spread unhappiness,” often affected Franny’s team. This person would challenge her as the team leader, saying “Why would I do that? You’re not my boss.” At the time, Franny’s idea of being a team leader was “Don’t rock the boat, and let’s just get by, and if the bad apple doesn’t want to be involved, fine. Who am I to say anything?”

Franny described her way of dealing with this challenge as “denial.” She thought that if she didn’t talk about it, it was going to go away. However, as Franny learned more about teams in the DILI, she realized, “I thought our team was in a good place, but we really, really weren’t in a good place.” Franny described the DILI cohort as a team filled with camaraderie and idea sharing, saying that the DILI meetings were, “[A] model of a team meeting with an agenda, pointed objective, and review of team norms. I found that structure very helpful … and a really good guide in setting up my own team meetings.”

As a team leader, Franny used many of the protocols from the DILI with her team including surveys, setting norms, celebrating their successes, and establishing check-ins. She found that their meetings became more productive than ever before. Together with another member of the DILI Franny worked to improve their team and recognized the effect a particular person (i.e., the “one bad apple”) was having on the team. She described how they realized that they had to address her behaviors (e.g., such as their inappropriate comments, talking negatively about others on the team, and her refusal to take on her share of the workload). Together, they began to engage in critical conversations and introduced teaming protocols. During their second year in the DILI, this “one bad apple” resigned from the MELC district in the middle of the year. Franny described the transformation of the team, “Not only did the climate of the team change, but the people within the team became more open, to talking about teaming,” and it made the team better for everyone.
Franny’s Teacher Leadership Today. Franny described learning about developmental diversity as the “root of her growth over the last three years.” She used developmental diversity to understand and support others, to have difficult conversations, and to transfer the teaming protocols from the DILI. Whether relaying information in a meeting or presenting professional development, Franny had begun to try to think about how people with different ways of knowing might perceive what she is going to say. This often led her to revise her plans in a way that, “gets her point across better.” She described herself as, “A little bit more understanding and patient of people because [I learned] that [others] are not experiencing things the same way I am.”

Franny summarized her DILI experience by saying:

I [used to think] well, “If you ignored it, it’ll go away.” [I gained] the recognition that, I can say something [i.e., speak my mind]. It’s just how I approach the situation. I feel much more comfortable not worrying about what others will think and saying exactly how I am feeling [and I’m] definitely more willing to confront the challenge instead of just kind of backing away from it…even if it will lead to a confrontation. That was something that changed. I’m able to deal with those kinds of challenges… before they get too big. [Now I’m] able to truly collaborate and really have an open discussion in a positive way.

Gabriella: “I’m Not Afraid to Be a Leader.”

I had been afraid of ruffling feathers and challenging people even when I knew that, the challenge was, necessary. I used to be very afraid of people’s reactions. I used to worry entirely too much about whether or not someone would be mad at me. [Now.] primary on my mind is what’s going to be best for kids and how can I deliver this information in a way where people are going to hear it and understand that this is what’s best for kids… [I have] less fear and I’m less worried.

Gabriella was a teacher, in her 50s, who had been working in the profession for more than 30 years. She was one of the most experienced teachers in the DILI.

Journey to Becoming a Teacher Leader. Gabriella reported feeling as though she “didn’t choose education, it chose her.” She remembered coming home from kindergarten and taking her younger sister out of the playpen and teaching her everything she had learned in
school that day. As a high school student, she would identify her peers who struggled and would sit with them to try to help them figure out what they were learning. Gabriella has only ever wanted to be a teacher. She had been a teacher in the MELC district for about 15 years at the time of this study.

**The Challenges of Teacher Leadership.** Gabriella said that prior to the DILI it was difficult for her to receive criticism from other teachers for her work ethic and passion. She told a story about how one teacher in particular would talk about Gabriella with other teachers, and asked, “Who is this Queen Bee?” She tried to avoid critical conversations and confrontation by saying, “Yes,” to what others asked her to do – which often led to her doing more than her share of the work.

At the same time, her principal and supervisor recognized Gabriella’s expertise, passion, and leadership and would often ask for her input. She was happy to collaborate with them, privately. However, if they asked her to assume any type of leadership in front of her peers, she would shy away.

I loved working with the other teachers and coaching them but I hated at faculty meetings or department meetings where the administration would ask, “What do you think of this? What do you think we should do?” And I would know what I wanted to say, but I found myself, either couching around it or, saying, “I’m not sure,” but I knew damn right, what the best research was, because I do research all the time and I’m always looking for better ideas. I knew consciously that I needed to be more comfortable with the idea of being a leader.

**Gabriella’s Teacher Leadership Today.** Gabriella realized being a leader does not have to be a bad thing. Her shift in perspective led her to embrace being a leader. She said, “Now my mindset has shifted and I don’t need to say, ‘Yes.’ I don’t need to be everything to everyone and I’m still a leader. So, I say, ‘No,’ and the reality is that, I’m quite comfortable saying, ‘No.’” She said she used to avoid saying, “No,” and having difficult conversations with her colleagues and
students. After the DILI she reported that she speaks candidly to students who are not working up to their potential and with colleagues who are not doing their share of work.

Gabriella was on a team with another member of the DILI cohort. Like the other 12 primary participants in this study, she described having another member on her team as, “Really helpful.” Together, they worked to “reframe the culture of the team.” They introduced norms, a survey, and celebrations for their successes as a grade level team. She also engaged in critical conversations with the teacher who criticized her work ethic and passion and who would speak negatively about her behind her back. Gabriella described the effect this had on her team.

    By setting norms, it made our time more productive, but also at the same time [I came to] understand that it wouldn’t happen magically and we would have to have some difficult conversations. And I would practice the scripts for those difficult conversations. Practicing them was pretty significant. There used to be someone who dominated our team meetings and spent the whole time talking about herself. My team and I just kind of sat back and let her spew right until she finished. Now if we’re working through an agenda and that happens, I’m okay with saying, “You know, hey, listen, I want to hear what you have to say, but we need to finish this item first.” I never would have done that three years ago, ever.

Gabriella summarized her DILI experience by saying:

    I have been asked more times than I can count to do some sort of, professional development, staff development whether it be for teachers on my team, teachers in the building, or teachers in the other buildings. And I never felt completely comfortable with it. [Now,] I’m excited… It’s fun…and I no longer avoid that role of being a leader.

**Joan: “I Didn’t Want to Be a Leader and I Didn’t See Myself as a Leader.”**

    I have been more vocal with my opinions, even when they’re not popular…. I learned that I could do these things. I could be more assertive and more of a leader. And it doesn’t matter if somebody had more experience than I did, I could take that role on because I believe that what I know was valuable.

Joan was a teacher in her 30s who had been worked in the profession for about 5 years, at the time of this study.
**Journey to Becoming a Teacher Leader.** Joan became a mother at a young age and pursued a degree in education while raising her children. She always loved helping others and wanted to blend her desire to help others with her interest in education. Joan had been a teacher within the MELC school district for over 5 years.

**The Challenges of Teacher Leadership.** Joan said that her job requires her to advocate for her students, but that prior to participating in the DILI she often struggled to feel “heard” when communicating with other teachers about students’ needs. As a less experienced educator, she often felt as though she could not share her opinion and would defer to her colleagues with more experience because, “[I] didn’t want to make waves. I just didn’t want it. I would say, Whatever you think.”

**Joan’s Teacher Leadership Today.** Joan described how – over the course of three years – she learned skills through the DILI that gave her the confidence to be more confident about herself and her knowledge. Joan credited her increased confidence in her ability to handle challenges with her newly established voice.

I have been more vocal with my opinions, even when they’re not popular and even when what I think needs to be done is not what others on my team thinks needs to be done. And now I’ve been [able to say,] “You might see it this way, but I see it this way and we can agree to disagree.” But just because I see it differently doesn’t mean I’m always wrong.

Joan described herself as able to have difficult conversations while being more collaborative. She said that she had begun to work to ensure that “everyone has a voice and encourages others to speak up and bring what they have to the table.” She also said that learning about *developmental diversity* and the *ways of knowing* were helpful to her. These concepts had taught her to shift her communication strategies to get people to provide students with support and she found that her meetings had become more productive and people had become more receptive to her approach.
Joan summarized her DILI experience by saying:

My biggest challenge was having an open mind and being, able to accept that I could be a leader even though I wasn’t the most seasoned person. In a nutshell, it’s made me a better mom because I’m not too worried about what other people think.

**Katie: “The Burden is Not All on Me. I’m Not as Isolated.”**

I just feel that the burden of having to do everything has been taken off my lap and I feel that teaming is actually more of a possibility. It makes your life easier – you don’t feel like you’re on your own island and people are willing to approach you and you’re able to create an environment of trust when you open up and show others how you really feel good and bad.

Katie was a teacher in her 40s who had been working in the profession for more than 15 years at the time of this study.

**Journey to Becoming a Teacher Leader.** Katie said that she grew up always playing school. When her father worked in a church, she would go with him and help the teachers. As she grew older, she babysat and was called *Mommy* by the neighborhood kids. Despite the fact that her father wanted her to be an engineer, Katie knew in her heart that she loved teaching, and has “never looked back.” Katie became a teacher in another school district right out of college. She had taught in the MELC school district for about 15 years at the time of this study.

**The Challenges of Teacher Leadership.** Katie said that prior to the DILI, she was a leader and a hard worker, but added that she struggled when collaborating with others.

I always did all the work. I would close out with the custodian and I wanted everyone to do the same and put in all the effort. I felt like people were, taking my work and not really sharing and I would get upset about it

Katie said that she used to think, “Everyone should be working as hard as me.” Through a developmental exercise, she realized, “[I] always saw myself as the one who knew it all. And could help anyone, but just didn’t care about what anyone else could contribute and I never tried to see it from their perspective.” She realized that because her workload was so large, her main
focus was always on simply getting the tasks done. She said that this led to her often feeling “misunderstood” by others, both at work and in her personal life. Katie said that before the DILI, she always seemed to have a conflict, or someone did not want to be around her, and that she never “understood it.” When something went wrong, Katie would cope with it by “burying it” (i.e., not facing it) in order to avoid a difficult conversation.

Katie described learning about the ways of knowing and how it shifted the way she saw herself and others as a transformative “a-ha moment” that changed her as a person. Katie began to see adults the way she saw her students.

I thought that children were growing and needed support. But as an adult, my assumption was that [adults] already knew what to do. Maybe they needed a little bit more direction in different strategies or approaches, but they…didn’t need as much support as children. I learned that, adults are just like children and basically, they are like a flower and you can water them and help them grow.

**Katie’s Teacher Leadership Today.** Katie described her leadership at the time of this study as, “Focused on everyone’s individual needs.” Instead of “disseminating information,” she had begun to take developmental diversity and her own assumptions into account – and even to let others see her vulnerabilities! Together with another member of the DILI she introduced norms, surveys, agendas, and check-ins to her team. The team increased its productivity, started to use its time to get work done, and began collaborating on lessons. Katie said that, as a result of these changes in her mindset and her collaborative practice, she felt “less burdened.”

I seek others’ input and do my best to work together. [As a result,] the burden is not all on me. I feel more fulfilled, I’m not as isolated, and it doesn’t all have to be done by me. I’m not alone. I feel that everyone, we’re in it together.

She described how, after the DILI, people seek her out, ask to visit her classroom, and how she mentors new teachers. She mentioned, “I think people have been able to relate to me more,
understand me more, and it’s actually improved so many relationships that I have.” Katie summarized her DILI experience by saying:

I have fears of people hurting me; it’s very hard for me to trust. But it is a better world when you understand who you are, and share that with others – good and bad. The world is not perfect, you’re not perfect and it’s not all good, but you still do need others. Collaborating and teaming can transform your world and you can become less burdened and have a more fulfilled life.

Mary “We Can Come Together to Get the Most Out of One Another.”

I didn’t really share. I didn’t really trust people with my vulnerability. [I realized] sharing and being vulnerable are actually giving a gift to yourself, but also a gift to other people in that the more people share, the better the experiences and the more they learn.

Mary was a teacher in her 50s who had been working in the profession for more than 20 years at the time of this study.

Journey to Becoming a Teacher Leader. Mary shared that, as a child, she had struggled with issues at home and felt misunderstood as a student. Two teachers in middle school “saw her.” They were able to identify the issues she was dealing with at home, and she was so grateful that they inspired her to become a teacher – so she could “be the same thing for other children.”

Mary taught for five years before taking time off to raise her children. She came back to the profession when they got older and had been a teacher in the MELC district for over 15 years.

The Challenges of Teacher Leadership. Mary said that before the DILI, she did not think her team had any challenges. However, as she learned more about teams and collaboration, she realized that she had been oblivious to the problems within the team. There were issues of trust, collaboration, and a lack of productivity. After she engaged in developmental exercises in the DILI, she noted that she came to realize that she had not been vulnerable and very rarely shared. She said that this had an impact on her team and her relationships with others.
Mary’s Teacher Leadership Today. Mary said that she had come to feel that she “has the tools to understand myself better.” She had become more patient and understanding of developmental diversity and the different ways of knowing. She further described how, over the course of her three-year experience in the DILI, she had made progress in working through personal difficulties and that she appreciated the “experience so much that she wants to do the same for other people on her team.” She had worked with other DILI teammates to introduce norms, a team survey, an agenda, and check-ins on her grade level team. These protocols helped her to create more productive and “smoother meetings,” which led to a stronger team. Mary also used her leadership to serve on the curriculum committee and to mentor a new team leader.

In summary, she said,

I feel like I have developed friendships that are very strong. I can lean on [the friendships I’ve been able to develop after the DILI] to, just have a conversation and I feel like it’s just been a much better experience because I was able to be more open and vulnerable at times.

Patricia: “There is a Lot of Power in Supporting Others and Helping Them Find Their Light.”

I’ve learned about adult development, and how to work with teams, and with people who have different personalities. I think that learning this is important, in any field, not just education, because we’ve learned a lot about our profession and we’ve learned a lot about children and teaching, but we weren’t ever taught how to effectively work with adults.

Patricia was a teacher in her 30s. She had been an educator for more than 15 years at the time of this study.

Journey to Becoming a Teacher Leader. Patricia shared that she wanted to be a teacher since she was a little girl. She loved being around her nieces and nephews, and in high school she described the decision as a “no brainer” because of her love of working with children. She had been in the MELC school district for the previous 5 years.
The Challenges of Teacher Leadership. Patricia described her difficulty (before the DILI) with balancing the amount of work she brought home and finding time for her family. She also said that she found working with other adults to be challenging, especially when working on a team. Patricia found it difficult to share her thoughts or to speak up. She described, “Before I would have gone with the flow, gone with what other people wanted to do, especially if there were stronger personalities in the group.”

Patricia’s Teacher Leadership Today. Patricia described how she learned about the ways of knowing and developmental diversity, over the course of the DILI. She credited them with her being better able to “understand people” as she strives to support them in a way that is “comfortable for them.” She has also learned to be more vulnerable, to use her voice, and to not be afraid to speak up.

From three years ago, it’s taught me to be a better listener and be better at communicating with others. I’ve found my voice and I’m not be afraid to speak up. But it’s also taught me when I speak up, to try to communicate in a way that I feel like is respectful to everyone. And just letting people know that, I’m coming from a good place. And I’ve come to understand the importance of teaming and working together and understanding one another or respecting one another. Regardless of personality differences, I’m just finding ways to come together and really work together.

Over the course of the three-year DILI, Patricia was on a team with other members of the DILI cohort. She worked with them to plan team meetings and introduce protocols to improve their team. Patricia said that, as a result, their team time transformed their meetings and began to collaborate together, analyzed student data, created action plans for struggling students and planned together. She also said that collaborating with her teammates and being able to work with colleagues from the DILI had resulted in her having a more manageable work load and less stress.

Patricia summarized her DILI experience by saying,
Sometimes growth, and change can be scary and very uncomfortable, but it’s not always a bad thing. When it comes to assuming a leadership role, before I would have tried to stay under the radar and out of the spotlight – even if it was something that may have interested me. But now, it’s something that I actually really enjoy being a part of, and want as many other people as possible to be part of it.

*Rosa: “My Voice Matters.”*

Sometimes in the past I wouldn’t say anything because I just didn’t think that it mattered or anything was gonna change. But now I think that I think my voice has promoted change. It doesn’t matter what your job description is. I think that, in a school, everyone needs to be respected and everybody’s voice needs to be heard.

Rosa was a teacher in her mid-fifties who had been working in the profession for more than 10 years at the time of this study.

**Journey to Becoming a Teacher Leader.** Teaching is a second career for Rosa. She went to school at night (while still working full time) to become a teacher. She said that, when she was younger, she always wanted to be a teacher, but her family did not have the resources for her to go to college. Teaching is a “childhood dream” that inspires her and that she loves every day – because she’s able to make a difference in a child’s life. She had been a teacher in the MELC district for more than a decade.

**The Challenges of Teacher Leadership.** Rosa said that teaming and working with others to share the workload were challenges for her, prior to the DILI. She described how she would try to do everything on her own. Rosa felt that if she wanted something done right that she had to do it herself – which contributed to feeling “a lot of pressure.” While Rosa had strong opinions, she would never share her opinions with others. She said that she was concerned that she would hurt someone’s feelings, so she did “not [have] much of a voice.” She also struggled with team meetings.

Everything was rushed…It was less academic and more about housekeeping, and people were doing different things. I would remember feeling frustrated a lot, during team meetings. Not speaking up, just rolling with the flow, thinking, “What difference does
that make, anyway?” …I’m going to sit here on my computer and get some work done and then move on.

**Rosa’s Teacher Leadership Today.** Rosa described herself as more of a team player and as someone who values collaboration, after the DILI. She noted how she utilizes *developmental diversity* and the *ways of knowing* to better understand others’ perspectives. She had begun to mentor new teachers and offer guidance and support to others in her care.

I definitely reach out to more people. I enjoy mentoring other teachers. I try to always make myself available to help out in any way that I can and to listen, too. When teachers confide in me if they’re having difficulties with things, I try to really take the time to listen to them and to help in any way. And I think learning about the different *ways of knowing*, helped me to see what I couldn’t see before.

Rosa also shared that her new-found appreciation for collaboration had been helpful in reducing her workload, as previously she would do everything herself. She had changed to welcoming other peoples’ knowledge and collaboration. She noted that this had also been helpful to her team, which included another member from the DILI cohort. Together, they worked with the team leader to introduce norms, have meeting agendas, take time to check-in, and to administer team surveys. She said their team meetings had become more “professional, accomplished, smooth, and productive.” Rosa noted, “Team meetings have transformed to create an environment that is conducive to the learning of students.”

Rosa summarized her DILI experience by saying:

I’ve learned that my voice matters and to respect other people’s opinions. I’ve learned to have more confidence in myself. I’ve learned to be a better, teacher leader. I’ve learned the importance of working on a team in order to have everyone grow and that is one of the most important things to be better for students. And I think happy teachers make happy students and I think it’s a process. Everybody needs to work together.

**The Three Non-Completers**

The second set of participants comprised of the teachers who did *not* complete the DILI. Below I describe the demographics of the three teachers who participated for just one or two
years of the DILI. I then share their stories of teacher leadership through their narrative vignettes.

Table 8 shows the demographic data and years of experience for this set of three additional participants.

Table 8

*DILI Non-Completers Demographics*

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**Anne: “I was Trying to be Heard.”**

Anne was a teacher, in her 40s, who had been working in the profession for more than 15 years at the time of this study.

**Journey to Becoming a Teacher Leader.** Anne wanted to be a teacher since she was a little girl, when she was inspired by a teacher who helped her when she was behind in reading. She described herself as being “blessed” to have had great teachers who made her feel safe. Anne wanted to create the same “safe” environment for kids. She had been an educator in the MELC school district for more than 15 years.

**The Challenges of Teacher Leadership.** Anne was in a new school and grade level, when she started in the DILI. At the same time, the district was undergoing massive changes (i.e., with a new superintendent, new supervisor, a new curriculum that focused on more rigorous standards, and a different pedagogical approach). She said that during her two years in the DILI, she found it helpful to work with other people, role play, have open conversations about what they were struggling with, and she discovered that many people shared the same struggles that
she faced. However, when it came to bringing the work back to her team, she found that her new teammates were closed off to any ideas she would present. Because there was so much change occurring, her teammates were always under duress, and she could not make their meetings an effective and safe environment for collaboration. She said, “I just felt like I wasn’t being heard, but I was still trying to have a voice about it.”

**Anne’s Teacher Leadership Today.** Anne said that over her two years in the DILI, she found that learning about the ways of knowing and developmental diversity were helpful in sharpening her communication skills. She said that she began to understand that people were different and learned both how to listen more and to take in everyone’s opinions. She also began to ask more questions and present options. She valued the “safe space” of the DILI and said that she recreated that space in her own classroom. She also tried to create a safe space in her team environment. However, being the only person on her team who had been part of the DILI cohort, people did not respect or understand norms and a survey when she tried to introduce them. She would try to collaborate, but found that her team was not accepting of her leadership. Anne said that, ultimately, she really struggled with her team’s lack of receptivity and the lack of support from the building principal to improve her team. After two years, she resigned from the DILI.

Anne summarized her experience positively, “I’ve learned so much about people, and the classroom and how people operate. It’s been slow and steady, and after three years there has been some change… but it was grueling in between.”

**Natale: “I Became More Approachable and Understanding.”**

When I could hear other people verbalizing their struggles, I thought I’m not such an oddball, after all. Everybody has their demons that they deal with, whether it be that they feel isolated or whether they get anxious about situations…It made me feel real, because sometimes you feel like you’re alone in your own world with your own demons – but you’re not, because everybody else has their crosses to bear. It was a very humbling
experience to share and hear that other people have shortcomings and things they’re trying to work on.

Natale was a teacher in her 50s who had been working as an educator for more than 15 years at the time of this study.

**Journey to Becoming a Teacher Leader.** Natale’s journey into education started as a mother, specifically when she saw the influence her children’s teachers had on them. That inspired her to return to school to positively influence other children. She received her teaching certification in her 40s.

**The Challenges of Teacher Leadership.** Natale described the rigor of the new curriculum standards and the pressure of standardized tests as challenges that she was facing when she joined the DILI. Simultaneously, she saw that changes in students’ family dynamics impacted their abilities to learn and even complete homework. She also mentioned her struggles with collaborating with her co-teacher. At first, Natale had “dreaded” the idea of sharing her space with others. However, over the course of her one year in the DILI, she came to find that the combination of having a co-teacher and the reflective space in the DILI had led her to a new appreciation for collaboration.

**Natale’s Teacher Leadership Today.** Natalie reported that, through the reflective activities in the DILI, she had come to realize that she had been “[negatively] judgmental” of others. She used the *ways of knowing* to understand others and tried to let people in – specifically her co-teacher. She came to consider her co-teacher her “biggest blessing,” realizing that her co-teacher was very understanding and that her input and ideas helped to challenge Natale’s assumptions. For example, Natale’s compassion for students with divorced parents who forget their homework grew as she realized that such things are not the students’ fault. Instead of
reprimanding the student (as she used to do), Natale showed compassion by giving them another opportunity to make up their homework.

Natale broadened her perspective to understand others and also realized that she needed to take time off. This led to her resignation from the DILI after one year. She summarized:

So, the cohort, even though I did leave it because I felt stressed at some point, the initial learnings that I got from that first year, in the long term have been very helpful, very effective for me.

**Samantha: “I Came to Understand Those Who Weren’t Like Me.”**

I’m very vocal about some of the things. And to me it was never an issue…I came to understand that what may not be a big deal for me was, possibly a big deal for another person. So, I probably can’t be very flippant about my response. I have to be more, measured in what I say.

Samantha was a teacher in her early fifties who had been an educator for more than 15 years.

**Journey to Becoming a Teacher Leader.** Samantha worked in business for many years before reevaluating her career choice. After September 11th, Samantha recognized that she wanted to spend more time with her family. This prompted her to pursue an alternative route teaching certification and she taught in a private school before coming to the MELC school district. She noted that her bonus in her original career was more money than her first year’s salary as a teacher. Samantha had been a teacher in the MELC school district for more than 10 years.

**The Challenges of Teacher Leadership.** Samantha described new curriculum standards, new pedagogical expectations, and new measures of accountability as formidable challenges for her, at the start of the DILI. She ultimately left the DILI after two years because of those same stressors – particularly her feeling accountable for student data and growth. “We are being very much driven to find the data, and use the data on a daily basis, as much as possible.”
She reported that she did not want to miss instructional time with students, and therefore opted to leave the DILI to ensure her students met the new expectations for growth set by the district.

**Samantha’s Teacher Leadership Today.** Samantha described how, even at the time of her interview (i.e., a full year after she left the DILI), she still appreciated learning about herself and others and still used the ways of knowing to help with this. “It helped me to understand some of the reactions of some of my team members.” In addition to better understanding her teammates, she also felt her team improved with the introduction of norms. As Samantha stated:

> The concept of setting norms was very new to the district. I think it’s been beneficial in terms of how we deal with each other on a team basis. We talked about how do we want to work as a group? What should be our general dynamic? And we came to an agreement that being on time is very important, and so is allowing each other to speak and to finish our sentences. I think it was, was a good reinforcer of how you really want to work as a group.”

Samantha summarized her experience by saying that the time to reflect in the DILI was helpful because it gave her time to “identify my strengths and where I could improve.”

**Six Administrators**

The third and final set of participants in this study was made up of the administrators. Below, I provide their demographic information and then share their vignettes. These vignettes are different because I included these participants to shed light on the teacher-participants. Therefore, these vignettes are focused on the administrators’ impressions of the teachers’ experiences in the DILI. I first introduce the three participating district administrators and then the three school-based principals. Table 9 summarizes the administrators’ demographic data and years of experience.
Table 9

Administrator Demographics

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*Bud: “We Always Talk About Differentiation with Students. It’s Not Just Students. We Need to Differentiate for Everyone, Everyone in Life.”*

We’re all working to help the students. There is no one higher than anybody else, so through discussions and activities that we did, we got to know each other, understand that we’re all in it for the same reasons. I think it just allowed us to communicate more freely and led to less separation between administrators and teachers.

Bud was a district supervisor, in his 40s, who had been an educator for almost 20 years at the time of this study. He had been in the MELC school district for nearly all of those years, first as a teacher and then as an administrator.

*The DILI*. Bud described how the DILI provided a space to be vulnerable, connect with teachers, and learn about developmental diversity and the ways of knowing. He also thought that it allowed participants to role play in a safe space before trying to introduce teaming protocols or to engage in critical conversations with teams and people outside of the cohort.

I think that the confidence level has risen with the teachers in the cohort. You’re seeing some teachers who were strong teachers, but you didn’t really see them vocalize. They did their own thing. I see those teachers now taking these leadership roles, having those critical conversations. I think the confidence level and understanding of how to present things to their peers is critical in leadership.
Elmer: “It’s Been Rewarding [to Connect with Teachers and Colleagues] and Something that was Not Only Powerful to Me, but Just an Eye Opener.”

The end product was that teachers feel more empowered and supported to be honest and open to actually presenting to their colleagues professionally and, that just raised the bar of professionalism for the district.

At the time of this study, Elmer was a district administrator, in his 50s, who had been working in education for more than 30 years.

The DILI. Elmer described the DILI as being filled with collegiality and respect, both of which helped to build relationships across the district. Specifically, he said that he connected with people he would have never connected with before. He thought that the DILI built the confidence of the teachers and created a system of support that expanded beyond the DILI, leading to the rest of the districts’ teachers feeling more supported. Elmer summarized his DILI experience by saying:

There are teachers that are stepping up through the leadership cohort who are actually leading and modeling behaviors and certain things that we want done.

Francis: “We All Work a Little Bit Better When We Know That Our Ideas are Listened To.”

I watched it help my teachers and it helped me as well. I could better understand where they were coming from and then adjust my approach to them. I got much better results when I would use some of those strategies and information.

At the time of this study, Francis was a principal in his mid-fifties who had been working in the profession for more than 30 years.

The DILI. Francis began by saying, “Each one of my teachers came out of it with slightly more, and in some cases, dramatic differences.” He explained that for some teachers, the experience added to the great foundation of leadership that they already had. For others, the tools they incorporated completely transformed their way of working and the respect they received
from their peers. Francis explained that two of them, however, did not have the capacity to respond to the DILI. Overall, Francis found that his teachers gained confidence, found their voice, and developed a repertoire of tools for critical conversations which created more productive teams.

It helps when teachers know they have a voice and they [are] listened to by administration. They have a voice. And I think they don’t always have to have what they wanted, but at least they’re listened to and their ideas have been thought about. [The DILI] has helped within my building itself. I already had a very strong sense of trying to build a community voice into the building and so the [DILI] dovetails with a much greater impact, with far deeper training. It really gave them specific ways to be a leader and understand how to interact with people as opposed to just finding people that are already naturally good at it and empowering them. It benefited them because it helped the teachers truly grow, with specific skills and capabilities and there’s a lot of positives for them feeling [that] they have an important role.

**Lynda: “I Grew Right Along with Them.”**

I saw the majority of our teachers, grow and become leaders in their own rights. It was nice watching the growth happen along with my own growth.

At the time this study, Lynda was a district supervisor, in her 50s, who had been working in the profession for almost 30 years.

**The DILI.** Lynda said before participating in the DILI, the teacher-participants had a really hard time having difficult conversations. She explained how, in the beginning, they would often complain about things, somehow without really addressing the problem. She described how this changed over the three-year institute, “I saw many of them just transform…They would stand up for their students and they would stand up to their teammates.”

She described how teachers brought their learnings from the DILI (e.g., creating norms, meeting agendas, and engaging in critical conversations) back to their teams to make team meetings more productive and to hold everyone accountable to high standards of professionalism.
Lynda also described how 11 of the 13 DILI completers led professional development—which she called “transformative” for the district. She added that the response from the other teachers (i.e., those who had not attended the DILI) was one of excitement and appreciation. Lynda summarized her experience by reflecting on how one of the unforeseen benefits of the DILI was that she was able to build relationships with the teachers and that helped them to build mutual appreciation for one another.

**Nicholas: “You Become Open to Different Things Where You Might Not Have Been Open to Them Before.”**

I believe it did open my mind to different philosophies and strategies that, to be honest, I might’ve been closed off to. You always have an open mind, but sometimes you don’t realize your mind is actually a little more closed until you sit with different people and share philosophies, seeing how it works and then seeing the effect.

At the time of this study, Nicholas was a principal in his forties who had been working in the profession for more than 15 years.

**The DILI.** Nicholas said that at first, he was skeptical about the DILI. After three years, he started to see it influencing his building.

[I] could see one of my teachers leading the team meeting with the strategies that were taught within the leadership cohort. [They were modeling] how to have a conversation, there were agendas, and the norms were set. Just seeing the quality of that team meeting time was a product of Leadership.

At the time of this study, Nicholas was a principal in his 40s who had been working in the profession for more than 15 years.

Much like the three district supervisors, Nicholas said that he enjoyed learning alongside his teachers and appreciated having a space to check-in and get to know each other. He also said that he saw an “increase of professionalism and responsibility, as the teachers would take on added responsibility that maybe they would not have [before] in order to make sure the whole
team was more effective in what they did.” Nicholas concluded by describing the shift in his faculty and how, instead of coming to him with every problem, they began coming to him with solutions. He commented:

[The DILI influenced the school because] specific people on leadership where you saw that skill kind of coming out, those norms, those expectations…you definitely see an increase in the team and their work because the expectations were raised. And you hope that what the average was, is no longer average anymore because our above average is now excellent in the way they conduct themselves. So, you hope that they gravitate up.

**Suzanne: “[Getting to Know] Different Points of Views was Helpful.”**

[For the teachers to see other teachers] leading meetings and leading professional development, it just really empowered the staff to see, “Wow, this is one of my colleagues that I worked with that is carrying out with me and really put a lot of effort into it.”

Suzanne was a principal, in her 40s, who had been working in the profession for more than 15 years at the time of this study.

**The DILI.** Like Nicholas and Francis, Suzanne described transfer of learning from the DILI to teacher leadership practices, but more so for some of her teachers than others. She shared that she saw her teachers leading professional development and implementing teaming protocols that were creating more productive team meetings, and engaging in critical conversations. She has also had “team leaders helping other team leaders problem solve” which Suzanne summarized as “an amazing experience” for her as a building principal.

**Chapter Summary**

The purpose of this chapter was to offer a contextual overview of the research setting, the DILI, and the three sets of participants. The participants included the 13 teacher leaders who participated in the full three years of the DILI, the 3 non-completers who completed just one or two years of the DILI (i.e., non-completers) and the six administrators who supervise the
teachers and are responsible for the district. I created these narrative vignettes from over 34 hours of interview data to provide a picture of each individual as a way to honor their personal stories of challenge, growth, and teacher leadership. In the next chapter I provide additional context of the research site by offering an overview of the findings from a district-wide survey, followed with an overview of the findings from the interview data.
CHAPTER V: SURVEY RESULTS AND SUMMARY OF FINDINGS

In this chapter, I provide an overview of the major learnings from my survey and interview data, which I came to as I sought to understand how, if at all, a developmentally intentional leadership institute (DILI) supported teachers in assuming acts of leadership. As I explained in Chapters I-III, the main purpose of this study was to understand how 13 aspiring teacher leaders describe the responsibilities and challenges of teacher leadership. While the stories of the 13 teacher leaders who completed all three years of the DILI are the heart of this study, I thought it was also important to learn both from the six administrators who supervised the teacher leaders and participated in the DILI alongside them, and from the three teachers who did not complete the DILI and dropped out after one or two years of completion. Because I understand that school districts across the nation are vastly different along many dimensions, I sought to further understand the context of this specific small K-8 northeastern school district and research site. Through a Likert scale and open-ended survey, I asked the teachers who participated in the DILI, and those who did not, to name and described the greatest challenges they face as teachers in the MELC school district.

In this chapter, I first present the findings from a district-wide survey. I designed the survey to inquire about particular challenges faced by teachers in the MELC school district. These data have helped inform my understanding of how the teachers described and understood their experience in the MELC school district. They also provided contextual information about my research site (i.e., this particular school district), which has helped me to better understand the stories told by the teachers and administrators who participated in the 3-year DILI aimed to support teacher leadership. In the second part of this chapter, I provide an overview of three major clusters of findings that arose.
• The DILI served as a holding environment for the teacher leader participants and they extended this supportive environment beyond the DILI.

• Learning about adult development, and developmental diversity through Learning-Oriented Leadership led to meaningful perspective shifts among the DILI completers.

• The DILI completers transferred their learning from the DILI to their practices of teacher leadership in their schools.

Taken together, I argue, these findings support and extend the use of Learning-Oriented Leadership (Drago-Severson, 2009, 2012a, 2016a) and best practices in professional development (Darling-Hammond et al., 2017) to help develop teacher leadership. Similarly, my findings further reinforce the need for teacher leadership and the powerful ways it can support teachers and positively influence the principals, teachers, and students in their respective schools. Following I share an overview of the survey analysis and a preview of the qualitative findings.

**Overview of the Survey**

The primary methodological approach of this study was a case study investigation (Yin, 2014). The survey was designed to provide insight into the context of the research site (the MELC school district) and to aid me in the interpretation of the interview data that I collected (Yin, 2014). As the intention of the DILI was to provide support to teachers in managing the complexity of teacher leadership, I was curious to learn about the specific challenges that all the teachers in the MELC district face. I also wondered if there were differences between the view and management of professional challenges by the teachers who participated in the DILI and those who did not participate. Therefore, I sought to examine the challenges faced by *all* of the teachers in the MELC district by addressing my third research question: *What do teachers in the*
district (i.e., both those who have participated in the DILI and those who have not) name as their most significant work-related “challenges,” both in general and particularly around managing workload, collaboration, and teaming?

Survey Participants

I administered the survey (Appendix A) to 90 teachers in the MELC school district in June of 2019, after the DILI cohort had completed their third and final year of the DILI. Sixty-seven teachers responded to the survey. I asked respondents to self-identify whether they participated in the DILI (and, if so, for how long) so that I could compare the responses between the teachers who participated in the DILI and those who did not. I then categorized and sorted the data by the three sets of respondents. Table 10 summarizes these groups.

Table 10

Three Sets of Survey Participants

<table>
<thead>
<tr>
<th>Participant Category</th>
<th>Description</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completers</td>
<td>Participated in the three-year DILI</td>
<td>11</td>
</tr>
<tr>
<td>Non-Participants</td>
<td>Did not participate in the three-year DILI</td>
<td>53</td>
</tr>
<tr>
<td>Non-Completers</td>
<td>Participated in the DILI for 1-2 years</td>
<td>3</td>
</tr>
</tbody>
</table>

DILI Completers

The first respondent category is made of up the teachers who participated in the full three-year DILI. These Completers comprise 16% of the survey sample size, with 11 out of the 13 DILI-completing teachers completing the survey.
Non-Participants

The second respondent category is made up of the Non-Participants. These are teachers from across the district who did not participate in the DILI, at all. 53 out of the 67 teacher respondents were non-participants. The Non-Participant respondents accounted for the largest group in the survey, consisting of 79% of the sample.

DILI Non-Completers

The third participant category is made up of the Non-Completers. There were three teachers in this category, all of whom completed the survey. The Non-Completers’ data accounted for 4.5% of the total sample. These teachers were in the program for different amounts of time before voluntarily electing to end their participation. As a result, these participants took part in and experienced some of the activities and learning of the DILI, though not all of it. Thus, these participants did not fit into either the Completer or Non-Participant categories. While I included these survey responses in the overall findings of the district, I considered these data to be inconclusive and set this data aside when describing the similarities and differences between Completers and Non-Participants findings.

Survey Results: Greatest Challenge Areas for Teachers in the MELC School District

In this section, I share results from my analysis of the survey data. As discussed in Chapter III, the survey consisted of six sets of questions (Appendix A). Each set called for a Likert scale response, sandwiched between a pair of open-ended questions. Essentially, the Likert scale questions attempted to examine how respondents ranked the different classes of challenges that I asked about (i.e., students, administration, parents, their grade level/department team, and colleagues), using a 1-5 scale. The results showed the DILI Completers identified working with their grade level/department teams as the greatest challenge. On the other hand, the
DILI Non-Participants identified managing challenges with individual colleagues as their greatest challenge. Note that the difference between grade level/department teams and colleagues is that colleagues differ from team members. They include other adults who teachers work with in a school such as, instructional aides, child study team members, special teachers (i.e., physical education, art, and band teachers), secretaries, and custodial staff. Results from the open-ended questions support the Likert scale responses and further explain the challenges teachers experienced with students, administration, parents, grade level/department teams, curriculum, and colleagues that could not be captured on a Likert scale of 1-5.

**Likert Scale Responses**

The Likert scale questions were designed to examine the challenges teachers faced in a variety of professional areas. Respondents were asked, “On a scale of 1-5, how do you feel you are managing this challenge?” for a variety of different challenge areas (i.e., students, administration, parents, grade level/department team, curriculum, and colleagues). Respondents were instructed that 1 indicated “managing/coping not at all well” and that 5 indicated “managing/coping very well/no trouble at all.” In order to analyze the Likert scale data, I first calculated the mean Likert scale response for each challenge area. Based on these results, colleagues were the greatest challenge area for all of the respondents (M=3.81). Second, I examined the data for the DILI Participants and Non-Participants subgroups. I then realized that the Non-Completers did not rightly belong in either subgroup, despite my having included them in the first group. They had not received the full DILI experience, but had taken part in a substantial portion of the program. This led to my third step, removing the Non-Completers, so that I could compare the DILI Completers with the Non-Participants subgroups. This comparison revealed slight discrepancies between the subgroups. For example, while working with
colleagues was the greatest challenge area for the DILI Non-Participant subgroup, it was not the greatest challenge reported by Completers (see below for a complete discussion). Table 11 summarizes the means rating of each challenge for the entire sample (i.e., including the DILI Completers and the Non-Participants). Figure 2 displays this in graphical form.

Table 11

*Mean Likert Scale Scorers by Challenge Area and Major Subgroup*

<table>
<thead>
<tr>
<th>Faculty Challenges</th>
<th>Overall Mean (including Non-Completers) (n=67)</th>
<th>DILI Completers Mean (n=11)</th>
<th>Non-Participants Mean (n=53)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>3.48</td>
<td>3.50</td>
<td>3.47</td>
</tr>
<tr>
<td>Administration</td>
<td>3.51</td>
<td>3.57</td>
<td>3.53</td>
</tr>
<tr>
<td>Parents</td>
<td>3.58</td>
<td>3.57</td>
<td>3.58</td>
</tr>
<tr>
<td>Grade Level Team</td>
<td>3.62</td>
<td>3.64</td>
<td>3.63</td>
</tr>
<tr>
<td>Curriculum</td>
<td>3.69</td>
<td>3.43</td>
<td>3.72</td>
</tr>
<tr>
<td>Colleagues</td>
<td>3.81</td>
<td>3.57</td>
<td>3.86</td>
</tr>
</tbody>
</table>

*Note.* Higher averages signify greater challenges. For example, the greatest challenge for the Total Average is Colleagues (M=3.81) while the least challenging is Students (M=3.48).

Figure 2 displays the overall mean for each challenge that is presented in Table 11.
After disaggregating the data by major subgroup, I looked for the smallest and greatest mean challenge areas for the entire sample size, the DILI Completers, and the Non-Participants subgroups. I then compared these across subgroups.
Figure 3 displays the disaggregated data of the Completers and Non-Participants Mean Likert Scale Scores by Challenge Area. Note that neither group rated any challenge area less than 3 or greater than 4. In fact, the range in each group was less than .5 points. Despite the fact that the Completers subgroup consisted of just 12 respondents, the means varied by less than 0.25 points.

**Comparing the Greatest Challenges for the DILI Completers and Non-Participants in the MELC School District**

According to the disaggregated data, the greatest challenge area for the DILI Completers was their *grade level/department team*, which had the highest mean rating (M=3.64) on the 5-point scale. The greatest challenge area for the DILI Non-Participants in the MELC district was *working with colleagues*, which had their highest mean rating (M= 3.86). Recall, 1 on the Likert
scale represented that a challenge area was no trouble at all, while five indicated that the teacher
did not think that she or he was handling a given challenge area well. Thus, higher averages
signify greater challenges.

Completers’ Greatest Challenge

According to the Likert scale data, the greatest challenge area for the DILI Completers
subgroup was their grade level/department teams. This category reflected the greatest mean
(M=3.64) on the 5-point scale for the DILI Completers. Figure 4 illustrates these results, and
shows how this compares to the Non-Participants. While these two groups’ absolute means
barely differ at all (i.e., 3.64 vs. 3.63), note that there is a larger number of Non-participant
respondents. There was not a statistically significant effect for DILI participation, \( t(67) = 0.78311, p = 0.44375. \)

Figure 4

Means of Greatest Challenge Area for Completers: Grade Level/Department Teams

![Bar Chart](chart)
Non-Participants’ Greatest Challenge

The greatest challenge area for the Non-Participants was colleagues. The colleague category reflected the greatest mean (M=3.86) on the 5-point scale, for the Non-Participants. Figure 4 illustrates this result, showing how this compares to the DILI Completers. Of interesting note, the DILI-Completers, identified working with colleagues as their second greatest challenge area. (It was part of a three-way tie alongside challenges with parents and administrators). There was not a statistically significant effect for DILI participation, $t(67) = -0.95873, p = 0.35040$.

Figure 5

*Means of Greatest Challenge Area for Non-Participants: Grade Level/Department Teams*

Survey Results: Lowest Rated Challenge Areas for Teachers in the MELC School District

The lowest rated challenge areas differed between the DILI Completers and the Non-Participants. When disaggregated, the Likert scale data shows that the lowest rated challenge
area for the DILI Completers in the MELC district was *curriculum*, with a mean of just 3.43 on the 5-point scale. The lowest rated challenge area for the Non-Participants in the MELC district was *working with students*, with a mean of just 3.47.

**Lowest Rated Challenge for the Completers**

The lowest rated challenge area for the DILI Completers was *curriculum*. The *curriculum* category reflected their lowest mean (M=3.43) on the 5-point scale. Figure 6 illustrates this result, and the comparative difference between the Completers’ and Non-Participants’ mean rating of this challenge area. There was not a statistically significant effect for DILI participation, $t(67) = -0.56336, p = 0.58356$.

**Figure 6**

*Means of the Lowest Rated Challenge Area for Completers: Curriculum*
Lowest Rated Challenge Area for the Non-Completers

The lowest rated challenge area for the Non-Participants was working with students. The student category reflected the smallest mean (M=3.47) on the 5-point scale for the Non-Participants. Figure 7 illustrates this result and the comparative difference between the Completers’ and Non-Participants’ mean rating of this challenge area. There was not a statistically significant effect for DILI participation, $t(67) = -0.63181, p = .53846$.

Figure 7

Means of the Lowest Rated Challenge Area for the Non-Participants: Students

Please note that this Likert scale data does not explain the meaning or reasoning behind the faculty responses to these questions about how well they believe they manage and coped with the different challenge areas. These results simply provide a very broad view of how the teachers in the MELC district rate these challenge areas (i.e., students, administration, parents, grade level/department, curriculum, and colleagues) and acknowledge the differences in between these
two major subgroups (i.e., Completers and Non-Participants respondents). The open-ended questions associated with each Likert scale response provide more insight.

I explain the open-ended questions on the survey and the results in greater detail in the following section.

**Open-Ended Questions Survey Responses**

The survey consisted of six sets of Likert scale questions, each sandwiched between a pair of open-ended questions (Appendix A). The first open-ended question asked respondents to describe the greatest aspect of the challenge that they faced for each challenge area. The second open-ended question asked respondents what would be helpful in managing this challenge. All of the open-ended questions on the survey were marked as “optional.” There were so few responses to the second open-ended question (i.e., about what would be helpful) that I determined that the data collected could only be viewed as inconclusive. That is, I was unable to draw any conclusion from those responses. However, the first question (i.e., about elaborating on their greatest challenges) received an ample number of responses. Next, I share the analysis process and results of that survey data.

In order to consolidate the responses to the first open-ended question, I began by creating a frequency distribution table that displayed the frequency of various responses and coded them (e.g., *time management*, *parental support*, and *meeting diverse learning needs*) in each subgroup (i.e., Completers and Non-Participants). I then counted the occurrence of values within each group of participant respondents’ responses. In this way, the table provided a distribution of values in the sample. Using this distribution, I was able to examine descriptive statistics and distributions for each category of challenges by dividing each value by the sample size to establish a percentage. I decided to not attempt a more sophisticated statistical analysis because
of the small sizes of the subgroups. Below, I share the open-ended responses and compare the DILI Completers and Non-Participants responses for each of the six challenge areas. When applicable, I also preview findings discussed in future chapters to make connections across the data.

**Greatest Challenge when Working with Students**

The DILI Completers most frequently reported that *engaging all students* and *parental support* were their greatest challenges when working with students, each mentioned 36% for across the entire set of respondents. In contrast, none of them cited any challenges within the challenge of working with students that were connected to curricular responsibilities such as *meeting diverse learning needs, accountability for student progress, academic rigor, or new standards.*

The Non-Participant respondents most frequently reported that *meeting diverse learning needs* and *engaging all students* was their greatest challenges when working with students, with 26% of this subgroup mentioning each category. In contrast, these respondents barely mentioned *accountability for student progress or parental support*. These results align with the Likert scale data. Figure 8 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup regarding their challenges when working with students. The percentages of respondents mentioning each individual challenge did vary by DILI participation, $\chi^2 (6, N = 67) = 0.8794, p = 0.01023$. However, adjusting for multiple comparisons moves this out of statistical significance.
As discussed in Chapter II, Benis Scheier-Dolberg (2014) notes that one adaptive challenge today’s educators are faced with is the shift in this country’s student population to include a more diverse range of needs – including a greater number of students who do not speak English as a first language, otherwise known as Limited English Proficiency (LEP) (Horsford & Sampson, 2013; Hussar et al., 2020) and an increased number of students’ who receive special education services (Snyder et al., 2019). These students require alternative approaches to learning, and thus the challenge of engaging all students might reflect the demands of planning lessons and modifications for diverse range of needs. This may also explain the challenge of parental support. Students who cannot learn as easily in traditional ways (e.g., those with learning difficulties or learning a second language) benefit from additional support at home.
Meeting the needs of more diverse learners and of new and more rigorous curriculum standards implicitly require increased collaboration (Santos et al., 2012). That is, new curricular standards not only present increased rigor in what students are expected to learn, they also call for math and literacy skills be intertwined with the other content area subjects (e.g., ELA, social studies, math, and science). This requires collaboration as content area specialists, special education teachers, and English as a Second Language teachers might need to engage all students and meet their needs.

One possible explanation for the difference between the Completers and Non-Participants responses is the fact that the Completers received training in effective models for teaming, working with adults, and collaborative practices as part of the DILI. In fact, the DILI explicitly taught collaboration and provided strategies for working with others, and this may have made a difference for them. In their interviews, 100% of the Completers reported a shift in their perspective regarding how they came to value collaboration and teaming after the DILI.

**Greatest Challenge when Working with Parents**

More than half of the DILI Completers (55%) and 25% of Non-Participant respondents reported that the greatest challenge they face with parents is lack of *support for academics at home*. The second most frequently cited challenge among the Completers was mentioned by 27% of respondents who pointed to parents’ *unrealistic views of their children’s abilities*. Among Non-Participants, 15% suggested that a *lack of communication* with parents was their greatest challenge with this. Figure 9 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup in respect to working with parents. The percentages of respondents mentioning each individual challenge did not vary by DILI participation, $\chi^2 (6, N = 67) = 1.765, p = .05997$. 

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Figure 9

*Frequency of Greatest Challenges Respondents Face When Working with Parents, by Subgroup*

It is not surprising that, as shown in Figure 9, 55% of DILI Completers’ reported that parents not *supporting academics at home* was their greatest challenge in this area. Recall, this challenge was also mentioned by 36% of this group who reported that *parental support* was their greatest challenge in working with students (Figure 8). As mentioned above, students with greater needs benefit more from additional support at home. Thus, this may have been the second area in which respondents mentioned this as a notable challenge for the DILI completers and Non-Participant survey respondents.
Greatest Challenge when Working with Colleagues

Non-Participants respondents rated working with colleagues as the greatest challenge area. Colleagues denotes fellow employees who are not on the same grade level/department team. What is most notable here is that individual example of challenges in this area were varied and there were not any notable differences between the open-ended responses that described the element of collaboration that was most challenging. Only 15% of the Non-Participant respondents mentioned that they faced no challenges when working with colleagues, and this was the most common response. Yet, in the Likert scale data, working with colleagues was reported as the most challenging category by the Non-Participants. Within this challenge area, lack of communication and trust with colleagues was the second most frequently reported obstacle (i.e., 13% of the Non-Participants). In contrast, thirty-six percent of the Completers reported that their greatest challenge when working with colleagues was lack of respect, professionalism, or work ethic, but that constitutes only four individuals. Time to collaborate and communicate was identified by 27% of Completers. Thus, both sets of respondents reported varying challenges when working with colleagues. Figure 10 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup regarding working with colleagues. The percentages of respondents mentioning each individual challenge did not vary by DILI participation, \( \chi^2 (7, N = 67) = 3.179, p = 0.7736 \).
In an attempt to understand the difference in responses between the two sets of participants (i.e., the Completers and the Non-Participants), I turned to the interview data. Ten out of the 13 Completers reported that after their time in the DILI, they were less stressed overall. The DILI completers repeatedly attributed this to the developmental “tools” they learned. These had helped them when working with others, with understanding differences, with dividing the work load effectively, and some participants spoke of how it improved their relationships. These tools may have been helpful when working with other colleagues too.
Greatest Challenge when Working with Grade Level/Department Teams

The DILI Completer respondents most frequently reported that working on a team was their greatest challenge area. Twenty-seven percent of the DILI Completers reported that the greatest challenge with their grade level/departments was lack of time to collaborate with other grade level/department members. A different 27% of the Completers reported a lack of input from teachers who have experience with students expressing multiple needs, i.e. needing assistance with students who have disabilities and special education as their greatest challenge in this area. A third (27%) reported coping with different viewpoints amongst the faculty was their greatest challenge in this area. In contrast, 42% of the Non-Participants respondents reported that they had no challenges when working with grade level/departments. Lack of time for collaboration was offered by 19% of the Non-Participants respondents. Figure 11 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup regarding working with grade level/departments.

This was the only category where there was a statically significant difference in the percentages of respondents mentioning each individual challenge by DILI participation, $\chi^2(6, N = 67) = 0.4816, p = 0.00049***$. Even adjusting for the fact that I conducted 12 tests of statistical significance, this difference remains. In fact, this also connects to the interview data in which the 13 DILI completers and the six administrators spoke in depth of how the teachers assumed leadership responsibilities that made their teams more collaborative and productive. More specifically, during their interviews, all 13 DILI Completers reported that their team meetings have become more effective, and this was corroborated by the three building principals. The statistically significant difference in the survey data shows that the training made a difference for the DILI completers when working with their teams.
This connects to the survey data as the administrator and teacher participant groups reported in their interviews that the teacher leaders transferred teaming protocols such as setting norms, creating check-ins, taking team surveys, setting team goals, and having agendas, and that these protocols made an important difference in team meetings. It, therefore, may appear surprising to see that a majority of DILI Completers reported that this was their greatest challenge area. It seems that their successes in improving how their grade level/department teams function did not erase how challenging this aspect of their work had been for them – particularly as they assumed responsibility for making their teams be better.

Alternatively, perhaps the DILI completers responded based on the obvious gaps between how well their grade level/department teams functioned and how well the DILI functioned. That
is, maybe participating in the DILI heightened their awareness of the ways in which their teams needed to be improved. Two DILI completers reported (in their interviews) that they thought that they did not have any challenges with their team until they experienced an effective team meeting in the DILI. It is possible that the Non-Participants did not know of ways to improve their teams – and therefore, did not see the shortcomings that could be improved upon. Interestingly, this is the first challenge area in which lack of time arose as a particular challenge for the Completers – and it also arose in later survey responses.

**Greatest Challenge when Working with Curriculum**

Forty-five percent of Completers and 36% of Non-Participants respondents reported that pacing/lack of time was their greatest challenge when working with the curriculum. This was the most frequently identified challenge in each respondent subgroup. Figure 12 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup regarding working with the curriculum. The percentages of respondents mentioning each individual challenge did not vary by DILI participation, \( \chi^2(12, N = 67) = 8.831, p = 0.282869 \).
Again, lack of time was cited as greatest challenge for both the Completers and Non-Participant respondents. Although the DILI Completers rated the curriculum as their smallest challenge, they most frequently pointed to not having enough time as a challenging component of the curriculum. As discussed above, shifting demographics and more rigorous standards that call to integrate subject areas requires collaboration (Santos et al., 2012), which, in turn, requires more time. It appears that – across the MELC School District – teachers felt as though they needed more time to work through the curriculum.
Greatest Challenge when Working with Administration

Forty-Five percent of the Completers reported that their greatest challenge when working with administration was inconsistency (i.e., with regard to their expectations of the faculty). More specifically, responses to this open-ended question revealed that respondents saw challenges when supervisors had conflicting or inconsistent ideas. The second and third most frequently mentioned challenges for the Completer respondents were fear of repercussion and lack of communication (in a timely manner), respectively. In contrast, 25% of the Non-Participant respondents reported that they did not see a challenge in working with administration. Only 17% stated lack of administration helpfulness when needed was their greatest challenge in this area. Figure 13 illustrates these data by summarizing the frequency of each of the different individual challenges mentioned by each major subgroup regarding working with administration. The percentages of respondents mentioning each individual challenge did not vary by DILI participation, $\chi^2(11, N = 67) = 6.162, p = 0.13769.$
One possible interpretation of the DILI Completers subgroup’s responses is that inconsistent expectations can be a developmental challenge for all ways of knowing, though in different ways. For example, socializing knowers want to know how to make their supervisor happy—and do not want to disappoint them—while self-authoring knowers have the internal capacity to compare external expectations to their own internal bench of judgement (Drago-Severson, 2019, “personal communication”).

Five DILI completers reported in their interviews, that they saw things that their administrators were doing that were not considered best practices, based on their learnings in the
DILI. Furthermore, one of the Non-Completers reported that they dropped out of the DILI because they felt as though their administrator was not modeling or supporting the kind of protocols that they had learned in the DILI, together. This person did not want to continue in the DILI without the building principal’s support. This kind of increased awareness on the part of those who participated in the DILI may explain why the DILI Completers identified lack of administrator support as a notable obstacle.

**Conclusion**

The biggest theme across the survey responses was that *time* is a challenge for both the Completers and Non-Participant respondents. This theme emerged across three categories: *working with colleagues, working on a team, and implementing the curriculum*. Lack of parental support was another major theme, again reported by both the Completers and the Non-Participants (i.e., in connection to the challenges of working with parents and with students). Teaming was the only survey question that revealed a statistically significant difference between the DILI completers and the three DILI non-participants. This is important because the statistical significant difference connects to interview data that describes differences in team meetings from both the teachers and administrators.

The survey provided data that helped me understand the greatest challenges for teachers in the MELC district – both those who were and were not DILI/interview participants. While the survey data provided valuable insight into understanding the MELC district as a research site, this data could not provide a complete picture. Following the survey, I conducted around 34 hours of interviews with the 13 DILI Completers, the 3 Non-Completers, and the 6 administrators who participated in the DILI. In the next section, I provide an overview of the
findings that I drew from these interviews. These findings emerged from the interview data and these claims were further substantiated by the district wide survey.

Overview of Qualitative Findings

The story of this study began four years ago, when 16 teachers and six administrators came together once a month to learn about teacher leadership as part of a three-year Developmentally Intentional Learning Institute (DILI). Three teachers did not complete the DILI (i.e., they completed either one or two years), 13 teachers participated in the full three years, and six administrators participated alongside them. The purpose of the DILI was to combine best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) in conjunction with the developmentally intentional Learning-Oriented Leadership model (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a) to support teacher leadership. To summarize cross-case findings, I describe three large findings that have emerged from the current study and the relationship between them. I will provide a brief overview and further describe each finding in Chapters VI, VII, and VIII. These findings include: 1) participants valued learning within a holding environment—the DILI; 2) participants came to change their perspectives while participating in the DILI; and 3) participants transferred learnings from the DILI as they assumed additional responsibilities in their roles as informal teacher leaders.

Finding Cluster 1: The DILI Acted as a Holding Environment (i.e., Provided Support, Challenge, and Stayed in Place).

My research revealed that all 13 of the participants who completed the DILI expressed that the DILI institute served as a holding environment. As mentioned in Chapter 2, the literature
defines a holding environment as a structure that provides both support and challenge to promote developmental growth (Drago-Severson, 2004a; Kegan 1982; Winnicott, 1965). All 13 participants referenced the holding environment of the DILI. Specifically, six participants utilized the precise term holding environment and seven others described how the cohort formed a team where they learned together in a supportive environment that allowed them to reflect, take risks, and step outside of their comfort zone. This was further reinforced by the six administrators who participated alongside their teachers, as well as the three non-completers who participated in only one or two years of the DILI. As is fully discussed in chapter VI, for all 22 study participants, this meant that they felt comfortable learning, reflecting, and taking risks in the DILI. Over the course of three years, they learned about and experienced Learning-Oriented Leadership as the holding environment—and voiced that this was important to them – to greater and lesser degrees – in three ways:

- **Holding Environment Finding #1:** The DILI provided support by utilizing developmentally intentional structures such as norms, check ins, check outs, and opportunities to reflect as ways to support adults across a broad range of developmental diversity (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a).

- **Holding Environment Finding #2:** The DILI provided challenges with embedded opportunities to reflect and confront assumptions, engage in critical conversations, and choose a leadership role.

- **Holding Environment Finding #3:** The DILI was structured to be longitudinal, that is it stayed in place. Over time as the teachers and administrators learned together in a cohort over the course of three years in a job-embedded, sustained, and collaborative
professional learning institute (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015).

Finding Cluster 2: The DILI Participants Experienced Perspective Shifts Regarding Themselves and Others, the Value of Collaboration, and the Way they Defined Leadership.

My research revealed that all 13 DILI completers reported that learning about adult developmental theory and developmental diversity or the notion that adults make sense of their experiences with different meaning making systems and the idea that adults can grow over time (Drago-Severson, 2004a 2009, 2012a, 2016a; Kegan, 1984; 2000) helped them to reshape their perspectives, including their view of themselves and how they saw and understood other people (i.e., their colleagues, administrators, the parent community, and even members of their own family). The 13 participants in the DILI cohort experienced a perspective change or shift – to greater and lesser degrees – in three ways:

- Perspective Shift #1: The DILI completers (13/13) reported that learning about adult development and Learning-Oriented Leadership in the DILI helped them to shift their perspective on themselves and others.

- Perspective Shift #2: The DILI completers (13/13) reported shifting their perspective on the value of collaboration. Specifically, they found it helpful when working together to divide their work load, solve problems, and support others.

- Perspective Shift #3: The DILI completers (10/13) reported shifting their perspective on what leadership is and how they viewed themselves as leaders.

My research revealed that the DILI completers assumed acts of leadership or transferred, their learning from the DILI to assume new and greater responsibility by assuming new responsibilities termed acts of leadership. In doing so, the teacher leaders’ developed what I term positive internal outcomes for themselves as they became more empowered, found their voice, and reported reduced stress. The teacher leaders’ acts of leadership and participation in the DILI positively influenced the school, district, and the teachers themselves, according to the teachers and the administrators.

- Transfer Finding #1: All of the DILI completers assumed greater leadership responsibilities as they transferred their learnings from the DILI to their practice as teacher leaders. More specifically, I explain that during their time in the DILI and following, the teachers assumed particular leadership responsibilities including leading professional development, assuming formal mentoring roles, informally supporting others, and introducing developmentally intentional teaming protocols.

- Transfer Finding #2: All of the DILI completers (13/13) reported greater feelings of empowerment. They described this in three main ways including feeling more confident, feeling valued, and finding their voice, which enabled them to speak up in new ways.

- Transfer Finding #3: The majority of the DILI completers reported feeling less stressed as they transferred their learnings from the DILI to help them manage the requirements of teaching and leadership (10/13). The DILI completers shared that their newfound abilities allowed them to (a) collaborate and divide their work, (b) say no, and (c) better manage their workload and challenges, all of which they said contributed to reduced stress.
Interconnected Findings

The interconnectedness of these findings revealed participants’ description of a three-step process that included: 1) learning in a developmentally intentional holding environment, which led to 2) experiencing a change in individual perspectives, which in turn led to 3) acts of teacher leadership. Figure 14 displays the interconnected nature of these findings and my analysis process. As shown in Figure 14, the findings of these studies are interconnected. First, the participants experienced a holding environment which provided a safe and nurturing space for teachers to reflect, and learn about developmental diversity and the ways of knowing (Drago-Severson, 2004a, 2007, 2009a, 2012a, 2016a). Participants explained that as a result of the developmental intentionality of this safe space, they reflected, challenged their own assumptions, and heard others’ perspectives. They shared that this in turn led to the second finding, a change in their perspective. Following their change in perspective, the third finding developed as participants described how they came to see themselves as leaders and began assuming acts of leadership.
In sum, the survey and interview data revealed that the DILI supported and challenged the 13 DILI completers to shift their perspective and assume new leadership responsibilities that
made a difference for the district according to the teachers themselves, the administrators who
directly supervised them, and a district wide survey.

**Chapter Summary**

In this chapter, I presented an overview of the major findings of my study. This included
my analysis of the survey (Appendix A) I administered this survey to 90 teachers in the district,
including those who did and did not participate in the DILI. I discussed the district-wide survey
data which revealed that teachers in the MELC district reported that their greatest challenge is
implementing the curriculum and their smallest challenge is teaming. I then explained the open-ended portion of the survey by comparing the responses between teachers who had participated
in the DILI and teachers who did not, revealing an overarching challenge of not having enough
time. The only topic that presented a statistically significant difference between DILI completers
and non-participant respondents was in regards to teaming. This was significant because it
connected to findings from the interviews data.

Secondly, I previewed findings from interviews with the teachers and administrators who
participated in the three year DILI and three teachers who did not complete all three years of the
DILI. The themes that emerged from the study revealed: (a) The participants valued learning
within a holding environment—the DILI; (b) The participants came to change their perspectives
to include a developmental lens through which they viewed themselves and other adults while
participating in the DILI; and (c) The participants transferred learnings from the DILI to support
their practice as teacher leaders.

In the next chapter, I further explain my first key finding that the DILI served as a
holding environment that allowed participants to take risks as they learned and provide support
to others as they assumed acts of leadership.
CHAPTER VI: GROWING TEACHER LEADERSHIP AND BELONGING – A LEADERSHIP COHORT AS A HOLDING ENVIRONMENT FOR THE FOUNDATION OF TEACHER LEADERSHIP

“It [the leadership cohort] made me feel more part of the whole school community or the whole MELC School District community.” -Angelica

In this chapter I discuss the first findings that emerged in response to my second research question: How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities? These findings show that the DILI completers (13/13) were supported by a holding environment as they learned within the three year Developmentally Intentional Learning Institute (DILI). As discussed in Chapter II, a holding environment is a structure—or a person, team or group—that provides developmental supports and challenges to promote growth (Drago-Severson, 2004b; Kegan 1982; Winnicott, 1965). The structure of the DILI was intentionally designed so that participants learned about and experienced a holding environment. The curriculum explicitly taught participants about adult development and the role a holding environment plays in facilitating growth as part of Learning-Oriented Leadership (Drago-Severson, 2004b, 2009, 2012a, 2016a). Thus, participants left the DILI with a first-hand experience of a holding environment that supported their leadership development.

There are three elements of holding environments (Drago-Severson, 2004b, 2009, 2012a, 2016a).

- Holding environments provide developmentally appropriate support.
- Holding environments provide challenge to encourage growth.
• Holding environments stay in place to provide longitudinal supports and challenges. The participants of this study said that the DILI facilitated their learning by incorporating all three of these elements. In fact, six of the DILI completers (6/13) used the term “holding environment” in their interviews. The other seven (7/13) described a holding environment, without using the precise term. Table 12 (below) shows that the DILI completers – experienced all three of these elements.

Table 12

*Three Traits of Holding Environments*

<table>
<thead>
<tr>
<th>Trait</th>
<th>Number of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>DILI provided support to teachers</td>
<td>13</td>
</tr>
<tr>
<td>DILI provided challenges to teachers</td>
<td>12</td>
</tr>
<tr>
<td>DILI stayed in place as teachers assumed leadership</td>
<td>11</td>
</tr>
</tbody>
</table>

The DILI served as a holding environment in three ways. First, it provided support by utilizing developmentally intentional structures such as norms, check ins, check outs, and opportunities to reflect as ways to support adults across a broad spectrum of developmental diversity (Drago-Severson, 2004b, 2009, 2012a, 2016a). Second, the DILI provided challenges as it presented the opportunity to reflect and confront assumptions, engage in critical conversations, and choose a leadership role. Third, the DILI was structured to be longitudinal, that is it stayed in place, over time as the teachers and administrators learned together in a cohort over the course of three years in a job-embedded, sustained, and collaborative professional learning institute with administrator participation (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015).
The first finding that I discuss in this chapter is the support provided by the DILI, as it was mentioned by all of the DILI completers (13/13). Participants described how they were supported, which they termed as learning in a “culture of comradery.” They credited this “comradery” to the cohort structure that consisted of both teachers and administrators (13/13).

The second finding that I discuss is about the developmentally appropriate challenges that the DILI provided to participants. The DILI completers mentioned opportunities to reflect and consider their assumptions (5/13); assuming leadership responsibilities in their schools (13/13); and engaging in critical conversations as challenges that they said “pushed me out of my comfort zone” (12/13). The third finding that I discuss is that the holding environment stayed in place – both within the DILI and beyond it – as the participants transferred their learnings. That is, they relied on their fellow DILI cohort members when working in their schools as they enacted teacher leadership. This included relying on other teachers in the cohort (12/13) and administrators (11/13).

Taken together, these findings show that the DILI acted as a holding environment by supporting the DILI completers’ development as teacher leaders. When applicable, I discuss these findings across three sets of participants: the completers of the DILI (n=13), the non-completers of the DILI (n= 3), and the administrators (n=6). However, the 13 DILI completers are the central focus of this study. I incorporate the administrators’ and non-completers’ comments to provide further context and triangulate the data, where I can.

**Finding 1: The DILI Offered A Safe and Collaborative Professional Learning Environment**

In this section I explore my first finding, that all 13 of the DILI completers (13/13) described the DILI as a supportive environment. To lesser and greater degrees, the participants identified two main elements about the structure of the DILI that served as a holding
environment. As shown in Table 13, participants explicitly noted the “sense of belonging” and “comradery” they experienced in the DILI as important features in making them feel supported (12/13). The administrators were also part of the cohort, as they participated in the DILI training alongside the teachers. Eleven participants described how learning alongside administrators served as a support (11/13). The DILI acted as a holding environment that supported teachers’ learning by creating a culture of a comradery and a team of support with teachers and administrators. As shown in Table 13 the cohort of teachers and administrators was a key component of providing support within the DILI.

### Table 13

**Supports within the DILI**

<table>
<thead>
<tr>
<th>Key Element of Support</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comradery within the cohort</td>
<td>12</td>
<td>Patricia, Joan, Ro, Mary, Edith, Katie, Christina, Angelica, Franny, Emma, Gabriella</td>
</tr>
<tr>
<td>Learning alongside administrators</td>
<td>11</td>
<td>Mary, Gabriella, Theresa, Cathy, Ro, Mary, Elizabeth, Fatima, Edith, Emma, Joan.</td>
</tr>
</tbody>
</table>

In the following subsections, I explore each of these two sub-findings. That is, I share the participants’ stories about the support of the DILI including the “comradery” in the cohort.

**A Cohort of Comradery**

All 13 of the DILI completers (13/13) shared how the DILI served as a holding environment for their learning as they felt comfortable taking risks when they engaged in the DILI learning activities including *teaming protocols*, *collegial inquiry*, and *leadership roles* (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a). Nine of them (9/13) specifically spoke about the “sense of belonging” they sensed, and how they felt as though the participants in the
cohort formed a team that contributed to a culture of “comradery.” Three of the non-completers (3/3) also saw the DILI as supportive. In fact, two non-completers attributed the structure of being able to learn from others as they came to the realization that “other people were having the same struggles.” The administrators (6/6) also described the cohort as “supportive,” “collaborative,” and filled with “comradery.” Two of the principals shared that the teachers’ positive response to the time built into the DILI for celebration of accomplishments were different from their own leadership style.

**DILI Completers Experience of Cohort Comradery**

All 13 DILI completers described the cohort as supportive, however the extent and emphasis across the participants varied as they highlighted different aspects of the experience that were of most support from their individual perspectives. Some participants described the atmosphere as being supportive (13/13) while others specifically emphasized the way they could take risks and truly engage in learning (9/13). Patricia, a teacher in her 30s with over a decade of teaching experience summarized both sentiments succinctly, “The DILI was always a welcome and supportive atmosphere and I feel like… the relationships we built over time really helped us in year two and year three to have more difficult conversations and open conversations.”

In this section I share how Franny termed the DILI a “cohort filled with comradery” and how over time both her relationships with her colleagues and her learnings grew deeper. I share Franny’s experience because she most typically captured how all 13 participants’ described the way the cohort provided “comradery.” I then share how Joan was motivated by the “belief by everybody that this work was important,” and describe Mary, who “modeled vulnerability.” I conclude with Rosa, who described how the cohort “gave her friends” and made her want to be better for herself and for them. These participants best typify the range of experiences shared by
the nine participants who spoke of the way the “comradery” of the cohort provided support for their learning.

“From the Very Beginning.” The DILI completers described that the DILI was a supportive atmosphere from the start. For example, Franny (a teacher in her mid-50s with over a decade of teaching experience) said that, “from the very beginning,” the DILI was “comfortable and filled with camaraderie.”

I felt from the very beginning a sense of, an open space for us to learn. I felt very comfortable even though, there were teachers from other buildings that I didn't really know. There were administrators and the superintendent was there, but it just felt really great, [and] I was so taken away by the atmosphere of, working together and working through these things. In the second year I think we all felt, much more at ease with each other, and more open to learning from each other. Each year it got better from that aspect. It was a great experience to share and, to learn from other members of the cohort and, to have some of the other members be very vulnerable and very open to sharing.

By way of preview for the third finding in this chapter, Franny emphasized how the support was felt even more deeply as the DILI persisted over time. It became “more supportive” as the participants got to know one another. For Franny, the “open space” and atmosphere of “working together” grew over time. Each year, she said, the “open space to learn” grew and “got better.”

“That Constant Positive Reinforcement.” Joan, a teacher in her mid-30s with over five years of teaching experience, described the culture of the DILI as “encouraging.” She said, “I think the culture is supportive…it’s just that constant positive reinforcement and... [the shared] belief that this work and everybody in there is adding something that was important.” In other words, Joan noted how the support within the cohort was sustained, and everyone in the DILI felt a “shared belief” in their value.

“I Was Able to be More Open and Vulnerable.” Mary, a teacher in her 50s with over two decades of experience, explained how the support made a difference that enabled her to grow in new ways. “I was able to overcome a challenge that I always had. I was able to be more
open and vulnerable and…that was good not only for me but for other members.” Mary recognized that as she felt supported she was able to engage more fully in learning. This allowed her to address a longstanding “challenge.” Mary also realized that as she modeled vulnerability – a key theme in the DILI curriculum – it helped “other members” as it reinforced the trust that the cohort had established and the way they could be open in learning from each other.

“It Gave Me Friends, and Confidence to Truly be the Best Person that I can be.”

The DILI completers understood that this supportive environment did not magically appear. Rather, they pointed to how the DILI structure and curriculum taught them the lessons they needed to build a supportive cohort. For example, Rosa (a teacher in her 50s with almost two decades of teaching experience) explained how they learned to take risks with their own learning and to be more supportive of others, both within the cohort and back in her school with her other peers.

I really enjoyed the role playing and I think that was definitely helpful to learn how to do [things]. [For example] …learning different ways of giving feedback was something that we talked a lot about and being able to be a better listener. And when you are giving feedback, just learning through the ways of knowing. It’s very difficult, and that is something that I felt when we had different scenarios and we practiced. That was so helpful because we got to just go through the whole process with a fake scenario. And…these are things happen all the time in schools. It’s helped me to be able to [do more]. I’ve led professional development, I’ve mentored others and informally people ask me questions and it’s very rewarding.

Rosa described how she was able to take risks in her learning as she “practiced” the “things that happen all the time in schools.” She emphasized how this supported her in being able to be more of an abetment for others as she cited learning specific content (i.e., ways of knowing) that she utilized in her practice as a teacher leader.
All of the DILI completers (13/13) specifically noted how the “culture of comradery” within the DILI created a very supportive atmosphere. Twelve of the completers specifically cited this element of support as being of importance for their learning (12/13).

**Non-Completers on the Cohort of Comradery**

The non-completers (3/3) also described the DILI as a comfortable environment in which they could learn and take risks. Bud (a teacher in his 50s with over two decades of teaching experience) described the DILI as “supportive” but did not elaborate further. Anne (a teacher in her 40s with over two decades of teaching experience) and Natale, (a teacher in her 50s with two decades of teaching experience) were more specific.

“I was Seeing that Other People were Having the Same Struggles.” Anne described the comradery and the vulnerability of the DILI by describing how seeing others with the “same struggles” and asking her DILI cohort for advice was helpful for her learning.

And I was seeing that other people were having the same struggles, and so then they would give suggestions of how I might be able to handle it. So that was really helpful, the small group work we did at leadership.

Anne highlighted the opportunities to learn from others in the cohort (i.e., reflecting, collegial inquiry, and role playing) as important aspects of the holding environment that provided comfort and supported her learning. Others’ modeling their vulnerability contributed to this, for her.

“I'm Not the Only One who has Issues to Deal with.” Similarly, Natale said that the trust and support of the DILI helped her and others to truly reflect and be open about their challenges. “When we would share with the team, it made me feel like, okay, I'm not the only one who has issues to deal with because I'm hearing other people too.” Again, others’ showing their vulnerability helped her connect their struggles with her own and made her open her to
sharing her own personal challenges. The non-completers saw the DILI as supportive, especially in how it created a space where participants could work through their common challenges.

*From the Lens of the Administrators*

The administrators (6/6) were also explicit about the supportive nature of the DILI cohort. Like Franny, one administrator also used the emic code “comradery” as he described the DILI as “filled with comradery.”

“*It Grew a Team of Teachers Who Didn’t Have a lot of Tools to Navigate Leadership.*” Suzanne, a building administrator in her 40s with over two decades of experience, was enthusiastic about how the developmental intentionality of the DILI was supportive for her teachers.

The structure and the support to everybody was fantastic. It grew a team of teachers that, I think didn't have a lot of background and tools to be able to navigate [leadership]. For example, facilitating productive team meetings, having critical conversations, speaking up, and leading professional learning.

She noted that before the DILI the teachers “didn’t have a lot of background and tools to be able to navigate [leadership].” And she explained that the DILI supported them by giving them the “tools” to “navigate leadership” (e.g., facilitating meetings, engaging in critical conversations, assuming leadership roles). She credited the structure and support of the cohort as a critical element that helped them to “grow” as novice leaders.

“*It Amazed Me by How Much they Needed the Increased Feeling of Comradery.*” Nicholas, a principal in his 40s with over two decades of teaching and administrator experience as an educator, came to the DILI with a different stance. The kind of personal support that permeated the DILI was not his personal preference, he explained.

It amazed me by how much they needed the increased feeling of comradery. It amazed me how so many people just enjoy it, which makes me feel embarrassed because I should really notice that. I’m very much the type of worker where just give me a job and I'll do
it. But [the teachers] just enjoyed the camaraderie, they enjoyed being on a team [and working] to accomplish a job.

As he mentioned, Nicholas was “amazed” by “how much” the teachers responded to and “needed the comradery.” The power of this kind of support was apparent to him.

“I Don’t Know Whether Everyone Responds to it in the Same Way.” On the other hand, Francis, a principal in his 50s, was a little “uncomfortable.”

There was a lot of promoting the accomplishments of individuals [in DILI meetings]. I think that's probably a personal situation. I don't gain a lot out of, having someone pat me on the back for things I'm doing. And I don't do a very good job of telling everybody the things that I'm working on things that I'm trying to accomplish. It's always coming from a place of appreciation. It's coming from a place of, really wanting everyone to feel cared about and things like that. But I don't know whether everybody responds to it the same way.

Because it was so different from his personal preferences, Francis was not sure whether “everyone responds” well to celebrations, positivity, and accolades. Nevertheless, like Nicholas he recognized that while he didn’t find it valuable for himself, his teachers did. He also noted that it was about making “everyone to feel cared about.” Both Elmer and Nicholas identified something that motivated their teachers that was different from their preferences.

**Cohort of Comradery Summary**

One way the DILI served as a holding environment was by providing support through a culture of “comradery” this was acknowledged by the DILI completers, non-completers, and administrators who all explained that while learning in the DILI they felt comfortable sharing, openly taking risks and, over time, engaging in deeper learning as they practiced their emerging leadership skills. Establishing an environment of psychological safety is an important component of supporting adult development as noted in both constructive-developmental theory (Kegan, 1994, 2000) and Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a). My analysis revealed that the support of a cohort of comradery contributed to the holding
environment of the DILI and assisted the teachers in being able to learn and transfer their learnings to their leadership practice (see Chapter VIII).

A second supportive element of the DILI was the way the administrators learned alongside the teachers in the DILI.

**Learning Alongside Administrators**

The second major element of support cited by the DILI completers (11/13) was the presence of the administrators in the DILI. The DILI was intentionally structured so that the teachers and administrators could learn *alongside each other*. This makes professional learning more meaningful (Darling-Hammond & Richardson, 2009) and is needed for teacher leadership to thrive (Bryant, 2017; Carver, 2016; Cooper et al., 2016; Jacques et al., 2016; Sinha & Hanuscin, 2017). Offering administrators and teacher leaders the same professional development helps to establish a common foundation for understanding, a common language, and opportunities to collaborate on shared visions and goals (Kerr, 2015).

 Eleven (11/13) completers revealed that learning alongside their administrators contributed to feeling “supported” and “valued.” Five participants (5/13) spoke about wanting “more support” from their administrators. Only one non-completer (1/3) mentioned the role of administrator support. She ultimately contributed part of her rationale for dropping out of the DILI on the absence of support she received. As this was not an explicit question from my interview protocols, this finding emerged through my data analysis (Creswell, 2014). For this reason, I cannot know whether those who did not bring it up did not think it was significant as a support (or as a challenge) or if they simply did not think to bring it up. The administrators on the other hand were asked about their experience learning alongside their teachers in their interviews. All six (6/6) responded that they “developed stronger relationships” as they
“learned,” “developed a “common language,” and “collaborated” with their teachers. To highlight the greater and lesser degrees of which the DILI completers, non-completers, and administrators shared their experience I chose the participants who best represented the diversity and range of experiences for each set of participants.

**DILI Completers**

In this section, I explain how Edith, described the administrators’ presence in the DILI as at first being “scary” but becoming “helpful.” I share how Emma, found that over time she was able to “speak up” and “collaborate” with her administrators. I chose Edith and Emma as the most representative of the 11 participants who emphasized this in order to illuminate the range of responses from feelings of “support” to partnership. Five DILI completers (5/13) wanted “more support.” To protect their confidentiality, I anonymously share their stories of wanting one or more of the administrators to be more “engaged” in the DILI and “follow through” and “practice” with what was learned in the DILI.

**“Willing to Give Me Advice.”** Edith, a teacher in her twenties with around five years of teaching experience, described her journey from “scary” to “help in any way possible.”

> It was a little scary because all of the administrators were in this cohort. But everyone [the administrators and teachers] made you feel warm and welcome, and everyone was very accepting and willing to give me advice and help in any way possible. I think it was a really good opportunity for me to get to know them.

For Edith, the longitudinal nature of the DILI allowed her to grow more comfortable. She was able to ask questions and appreciated the “advice” she received. Over time she “got to know” her administrators and felt they were “very accepting” as opposed to “scary.”

**“I was Comfortable Just Speaking Up to the Administration, Even if it was Something That...Might Not Be a Popular Idea.”** Like Edith, Emma, a teacher in her 40s with
over two decades of teaching experience, felt unsure as she began working alongside administration but described how her relationship with her administrators changed over time.

[Over time] in cohort, I was comfortable just speaking up to the administration, even if it was something that...might not be a popular idea with the administrators... Not challenging them, but just...trying to [see] things in a different perspective, which...showed me how important it is to just establish that type of space…whether it's within your team and having team meetings and having everyone...on the same page.

The time in the DILI spent learning alongside administrators helped foster a relationship where Emma could “speak up” as she saw herself as helping to bring “everyone on the same page” even when an idea might be “unpopular” with administrators. Being able to share one’s thoughts is a critical component of teacher leadership, as teacher leaders and administrators are called to work together and collaborate on improvements (Wenner & Campbell, 2017). Edith and Emma highlighted how for them and eight other participants the administrators’ participation in the DILI provided support, as overtime the teacher leaders and administrators got to know each other and were able to collaborate together.

*Wanting More Administrative Support*

Five DILI completers (5/13) spoke of how they hoped their administrators would provide additional support. All five participants wanted their administrators to be more fully engaged in the DILI learning sessions (i.e., attentive and share more about themselves), and hoped they would model more vulnerability. Two participants also revealed that their administrator “did not follow through with what we learned in leadership” (2/13). I do not use any of the participants’ names in this section in order to provide an additional layer of protection for their privacy.

“I Desired [to] Hear More from More of the Administrators.” One DILI completer explained, “A few administrators you could tell were very comfortable sharing their successes,
and things that maybe didn't go so well. I didn't necessarily see that with all [of them].” This completer wanted to see more “sharing” from all of the administrators.

“**You’re Following these Practices and You're Working for an Administrator Who, Isn’t.**” Another DILI completer explained how their administrator contradicted the lessons they learned in the DILI.

We went through this program with our administrators and it becomes a challenge when you’re following these practices and you're working for an administrator who, isn’t. It has been eye opening for me going through all of this and, changing the way that, I've done things in my work with my colleagues for the better and sometimes thinking about things I see, and I think ‘wait a second, that's not what we learned in the cohort.’

These teachers found that as they learned about leadership in the DILI they were able to spot when an administrator was not living up to the learnings from the DILI or the practices that the teachers adopted in their own leadership practice.

**Non-Completers**

One of the non-completers (i.e., a teacher who dropped out of the DILI program) shared that while she “loved going to [the DILI] and didn’t want to quit,” she was trying to work through challenging team dynamics in her school – including “people talking behind one another’s’ backs and a team that wasn’t talking to each other at all.” She asked for help and was disheartened by the lack of support she received from her administrator.

It got really bad.... By the end of the year, no one was speaking and unfortunately, our principal said that she was going to take care of it and ... and I, was hopeful... but she never did. At that point I quit [the DILI] because I don't know what else to do when I'm not getting support from my principal.

This non-completer shared that she “didn’t know what else to do” and ultimately, quit the DILI because she did not receive support or see her administrator following through with their learnings from the DILI. Each of the five participants who spoke of a “lack of support” utilized different strategies to deal with it. While some were disappointed (4/13), one figured out how to
use what she knew to work around their administrators’ limitations (1/13). The DILI non-completer, who was not able to overcome the lack of support, explained that she quit the DILI as a result of it. Clearly, though most of the participants valued the administrator’s inclusion, it was not without problems. Interestingly, as the DILI completers learned, they grew better able to identify specific areas of needed administrator improvement.

From the Perspective of the Administrators

In their interviews, the administrators spoke of how the DILI was “worth it” for them and their schools (6/6), but they did report some issues. The principals (3/3) said that finding substitute coverage for DILI participants to attend sessions was sometimes a challenge. All of them (6/6)—the three principals and three district level leaders—cited larger pressures on their time that made carving out space in their schedule for this particular responsibility difficult. Nonetheless, they said the DILI was both supportive for their own learning and helpful in building relationships with their teachers. Generally, they echoed what the DILI completers shared. In response to an interview question asking the administrators how they felt about learning alongside their teachers, all six (6/6) responded that the DILI was a “supportive” environment where they felt they “developed stronger relationships” and “learned” with their teachers. All six shared that they were able to set goals and collaborate with a “common language” on next steps. Only two (2/6) administrators spoke of how they modeled “vulnerability” in the DILI sessions. I chose Elmer, Nicholas, and Bud, as the most representative of all six participants to illuminate how the administrators experienced the “collegiality” of the DILI and got to “learn” and know their teachers in “new ways” as they “built relationships” and collectively worked towards what they “needed to accomplish.”
“I've Never Experienced Anything Like That to be Part of a Cohort with my Fellow Administrators and People that I Supervise.” For example, Elmer, a district level administrator in his mid-50s with over two decades of administrative experience, certainly saw the supportive nature of the DILI cohort of teachers and administrators.

I think in that room when you build the confidence of 20 people in this leadership cohort, I think it builds a lot, of support. So, if those same people are sitting in that moment where you turn-key something to, the rest of the [teaching] population at large you should feel very supported and very protected. And I think that really came across. So, I think, the relationships and the trust you're building within that room, for that day translates, back out into the bigger mass, [i.e. the district].

Elmer noticed that the teachers’ confidence grew, and they felt “supported” and “protected.” They also developed “trust” with their administrators. He further described how this type of learning experience was new for him. He concluded—as shown above—“I've never experienced anything like that to be part of a cohort with my fellow administrators and people who I supervise, and work with.”

“I Believe if Teachers and Administrators are able to Let Down their Guard… That's Really Where You get that Bond.” The issue of showing vulnerability as a leader was important to administrators, too. Bud, a district administrator in his 40s with two decades of experience, described how he “bonded” with the teachers in the cohort.

One session was, about vulnerability, and talked about how hard and important it is for leaders to be vulnerable and teachers and administrators [both] shared, and it was a nice moment where you let all your fears kind of go to the side and, just voice it. And it's very freeing, I believe if teachers and administrators are able to let down their guard and talk about their fears that's really where you get that bond.

Bud said that he felt comfortable being “vulnerable” in the DILI. He described how he was able to be himself and found it “freeing.” For Bud, having a space to share his “fears” helped him to “bond” and build relationships with his teachers.
“I Thought That was Just Invaluable When We're on the Same Page with what We're Trying to Accomplish.” Nicholas, a building principal in his 40s, also pointed out how special opportunities to work with his teachers can be: “It’s rare that we have opportunities to actually sit and talk with teachers.” He pointed out that this experience helped him to understand his own practice better, “I got to see how I operate from different perspectives that I didn't, notice because obviously we see from [our own] perspective.” Nicholas further described the relationships, understanding, and time to “get on the same page” as “invaluable.”

Both the teachers and administrators reported that the environment of the DILI was supportive for their individual learning, and that learning together also provided additional support as it helped develop stronger relationships between administrators and teachers.

**Finding 1 Summary: The Supportive Structure of the DILI**

Across the three sets of participants all 22 said that the DILI was supportive to them in their learning. This includes all 13 of this study's primary participants (i.e., the DILI completers). The participants shared that the developmentally intentional curriculum (e.g., time to reflect, engage in conversations, role play, experience teaming protocols) and the structure of the DILI (i.e., learning within a cohort, participating in team building, learning alongside administrators and being part of a long-term three-year institute) both contributed to the supportive component of this holding environment (i.e., a space where the participants could feel supported and pushed to grow, as is necessary to support adult development; Drago-Severson, 2004b, 2009, 2012a, 2016a; Kegan 1994, 2000; Kegan & Lahey, 2009). Appendix G lists the developmentally intentional activities of the DILI. These activities are supported in the literature as best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) though not all of them were volunteered by the participants in this study.
Next, I discuss my second finding, that the DILI served as a holding environment by providing challenges, and the opportunity to grow.

**Finding 2: Providing Developmentally Appropriate Challenges**

In this section, I explore my second finding, that all 13 of the DILI completers spoke of challenges that they faced within the DILI—and how these different kinds of challenges—or developmental stretches—supported them in their learning and in their emerging leadership. As discussed above, a holding environment provides both support and challenge in order to support growth (Drago-Severson, 2004b, 2009, 2012a, 2016a; Kegan 1984, 2000; Winnicott, 1965). That is, the challenge is *necessary* because the challenge creates the impetus for growth, while the support sustains those in the holding environment as they engage in that process. The DILI, a holding environment, provided challenges to the participants in three ways. Table 14 displays each of the three types of challenges that the participants named in their interviews.

**Table 14**

*Three DILI Challenges for Teacher Leaders*

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Number of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having critical conversations</td>
<td>12</td>
</tr>
<tr>
<td>Assuming a leadership role/responsibility</td>
<td>13</td>
</tr>
<tr>
<td>Reflecting and challenging their own assumptions</td>
<td>5</td>
</tr>
</tbody>
</table>

Though Table 14 shows that just five DILI completers (5/13) mentioned *reflecting* and *challenging their own assumptions*, this was part of the DILL curriculum for all of the DILI participants (Appendix G). Similarly, participants were challenged to practice, role play, and take part in *critical conversations* (i.e., sharing their thoughts when doing so would constitute taking
an unpopular stance), (12/13). All of the participants (13/13) discussed assuming a leadership role/responsibility, as a challenge at length.

In the following subsections, I explore two of these challenges: reflecting and challenging their own assumptions, and having critical conversations. That is, I share what the participants told me about the challenges they faced in the DILI. The last major challenge, assuming leadership roles was the focus of the third year of the DILI, and is fully discussed in Chapter VIII.

It is important to note that there are multiple meanings for the word “challenge.” Lay people may refer to anything difficult as a challenge, whereas Heifetz et al. (2009) and Heifetz and Linsky (2017) had a more specific idea in mind. In Chapter II, I reviewed how he refers to different kinds of obstacles or tasks as either technical, adaptive, or mixed challenges. While I am sometimes most interested in the kinds of challenges that require cultural change to work through (i.e., either adaptive or mixed, in his terminology), these ideas are somewhat different than developmental challenges (Drago-Severson, 2004, 2009, 2012a, 2016a; Kegan 1984, 2000; Kegan & Lahey 2009, 2016). Kegan and Lahey (2009) explained that asking people to engage in tasks that are beyond their current level of cognitive complexity requires a shift in mindset that constitutes constructive-developmental growth. In order to manage “the greater complexity of the world it involves adding new skills or widening our repertoire of responses” (p. 12). Drago-Severson (2004b) explained that “growth occurs when individuals experience challenge, an experience that disturbs their current belief system and calls on them to reconfigure that belief system on a new and more complex level” (p. 174). This type of growth is called transformational learning. Drago-Severson (2004b) reminded us that this can even be a “painful
and difficult process” (p. 174). As mentioned above, the challenges that contribute to holding environments are those that provide impetus for developmental growth.

Not only was the DILI designed to provide such developmental challenges, but I believe that the participants in this study spoke of them, as such. However, they did so with a variety of language. For example, they might have called something “awkward” or spoken about “discomfort.” The Emic concept that the participants described most frequently was feeling “out of my comfort zone.” This phase was used by nearly half of the DILI completers (6/13). Of course, they also used the word challenge itself. When they used the particular word, I have had to discern whether they meant it in the lay sense, the Heifetz sense, or the developmental sense.

**Challenges in the DILI: Critical Conversations**

The first way that the DILI provided developmental challenges – and in doing so served as a holding environment – was that it pushed teachers to “speak up,” even when what they had to say might be unpopular. In the DILI, this was called a critical conversation, an important topic in the DILI curriculum. The teachers role played taking a stand for what they believed in, such as standing up for students, standing up for themselves, or saying what they thought was right. (Of course, the DILI was designed to provide direct support for this difficult challenge, such as providing opportunities for the teachers to practice speaking up and learning about a developmental approach to feedback (Drugo-Severson & Blum-DeStefano, 2016). All but one of the DILI completers (12/13) said that these critical conversations were a significant challenge for them.

The ability to speak one’s mind when it could be faced with disapproval, or negative feedback from others can be a developmental challenge. This requires an internal capacity to handle others’ disapproval or dislike and necessitates some self-authoring capacity (Drago-
Severson, 2004a, 2007, 2009, 2012a, 2016b, 2020; Kegan 1982, 1994). MacDonald (2011) noted that when teachers do not have the capacity to have honest discourse it creates a “culture of nice.” She explained that this is a culture that lacks trust and displays of vulnerability, and that it prohibits meaningful discussions – including the analysis of student work, discussions about race and/or discussions around student equity. This is why the DILI included so much work around supporting teachers to address this the developmental challenge of sharing their potentially unpopular thoughts. It is a critical element of supporting the work of teacher leaders and school improvement.

The DILI completers spoke of three realizations that they had about critical conversations. These are shown in Table 15. The thread in all of them is a discomfort with disagreement that produced a fear of such conversations. As Elizabeth said, “In the past, I would've just avoided any kind of conflict at all.”

Table 15

Realizations about Critical Conversations

<table>
<thead>
<tr>
<th>Realization</th>
<th>Number of Participants</th>
<th>Names of Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignoring a problem is not easier than talking about it</td>
<td>9</td>
<td>Emma, Elizabeth, Edith, Franny, Joan, Katie, Gabriella, Rosa, Patricia</td>
</tr>
<tr>
<td>Newly equipped with the strategies for having critical conversations</td>
<td>8</td>
<td>Elizabeth, Mary, Edith, Cathy, Katie, Gabriella, Rosa, Patricia,</td>
</tr>
<tr>
<td>Overcoming the fear of conflict</td>
<td>5</td>
<td>Fatima, Elizabeth, Edith, Gabriella, Rosa</td>
</tr>
</tbody>
</table>

As Table 15 shows, participants emphasized three reasons why critical conversations were a challenge, and each centered on their own discomfort with disagreement. Nine DILI completers (9/13) spoke of this developmental challenge in the context of recognizing that
ignoring a problem is not easier than talking about it. I share Gabriella and Patricia’s experiences about how they used to “ignore problems,” and how overcoming their discomfort with disagreement led to improved communication and relationships. Eight DILI completers (8/13) discussed the developmental challenge of critical conversations and spoke of feeling that they could now engage in critical conversations because they were “equipped with the tools” to take an unpopular stance, including an understanding of the ways of knowing. To further illuminate this finding in more detail I will share the experience of Katie, who emphasized how having strategies to engage in critical conversations made her more willing to share her feelings. Five DILI completers (5/13) directly addressed overcoming a fear of conflict, which allowed them to speak up regardless of what others would think of their opinion. I highlight Elizabeth, who shared that she “would not speak” because she was afraid of conflict, and how overcoming this fear led to better communication with parents and colleagues. Next, I describe how these teacher leaders were challenged to engage in critical conversations as they overcame the barriers of (a) ignoring problems; (b) becoming equipped with strategies to have conversations; and (c) overcoming a fear of conflict.

**Ignoring a Problem is Not Easier than Talking About It**

Over two-thirds of the DILI completers (9/13) spoke of a realization they had in the DILI, namely that they used to think it was easier to keep their feelings to themselves when an obstacle arose, rather than address it. Through practice with critical conversations in the DILI, they were able to also have critical conversations outside of the DILI. They did this with newfound success in their respective schools with colleagues and teammates. This enabled them to recognize the challenge that had kept them from speaking up. Gabriella spoke of how she “used to avoid those conversations” but now has “improved communication” and “no hard feelings.” While Patricia
spoke of how these conversations are “still hard” but “had to be had for a successful partnership.” Gabriella and Patricia most typify the responses from all nine participants.

“**I Used to Avoid Those Conversations.**” Gabriella, a teacher in her 50s with over two decades of teaching experience, described that having a “map” helped her to have critical conversations and she was surprised to find that sharing her feelings *was actually easier* than keeping them to herself.

I used to avoid those conversations and people knew that about me. So, they knew if there was something they didn't really want to do working with me was going to be a bonus because it was going to get done whether they did something or not. And I also wasn't going to rat them out if they didn't do it. Now, nope. We received a map [in the DILI] to know how to have these conversations. [For example,] I had a critical conversation with a colleague who didn’t do what he had to do the year before and he actually apologized. It's improved levels of communication to a point where there are no hard feelings... I don't avoid those conversations and in a weird way, I actually kind of enjoy them.

Previously, Gabriella “avoid[ed]” critical conversations and the “hard feelings” they produced. She emphasized that instead she would do other people’s work, instead of addressing the issue with them. She was so uncomfortable with this kind of conflict that she developed a reputation that she would not “rat them out.”

“**They’re Still Not that Comfortable for Me. I Learned Just How Critical It Was.**”

Like Gabriella, Patricia, a teacher in her 30s with over a decade of teaching experience, realized that that she had been avoiding important conversations.

Difficult conversations are something that was very hard for me in the beginning, and they’re still not that comfortable for me. I learned just how critical it was. Especially in my co-teaching partnership this year. Sharing that classroom responsibility and the potential success or failure of students with someone else, is not always easy. But I learned that, difficult conversations have to be had, in order to avoid further problems and to have a successful partnership or a classroom.

Unlike Gabriella, Patricia’s experience with creating a “successful partnership” by engaging in “difficult conversations” had yet to make her comfortable with critical conversations. They had
been “very hard” and remained “not always easy.” However, in spite of the challenge that these conversations presented to her, the DILI showed her that they were important enough (i.e., “critical”) that she would have them anyway. For Patricia and other DILI completers, the DILI pushed them to confront this challenge, even though it gave them tools and supports to face it.

**Tools to Have Critical Conversations**

Eight DILI completers (8/13) spoke of their history of critical conversations as being difficult and how the context of the DILI gave them new “tools” with which to address them. That is, as they participated in the DILI, they learned about the ways of knowing and role-played critical conversations (Drago-Severson, O’Connor, & Blum-DeStefano, 2018) and in doing so they gained tools and strategies for critical conversations. These tools included using the ways of knowing for differentiating feedback (Drago-Severson & Blum-DeStefano, 2016, 2020), planning out critical conversations, and role playing with a colleague (Drago-Severson, O’Connor, & Blum-DeStefano, 2018). Katie, a teacher in her 40s with over two decades of teaching, exemplifies how these DILI completers spoke of learning “how” to have critical conversations.

“I Didn't Really Have Training on How to Communicate When Something was Difficult.” Katie described how learning how to have a critical conversation was helpful.

If something was going wrong, my coping mechanism was to just bury it and get over it, and never really face it. And when I identified that goal, it was very, hard. It's still hard, but, I'm so much better at having [difficult conversations] and trying to communicate whatever the issue may be. I learned how you should address difficult conversations. I didn't really have training on how to communicate when something was difficult. So that was a big a-ha moment for me as well. [In the past] I had received some critical, conversations and I thought people were just getting on my case. [Now] I realized the importance of those critical conversations and the feedback [others had given to me].

Katie’s “big ah-ha moment” about critical conversations came as she learned how to communicate when something was difficult.” She realized that people were not just “getting on
my case,” but instead giving “feedback.” Like so many of her colleagues, she shared that “it’s still very hard,” but the DILI’s various lessons fortified her as she confronted this challenge.

“I Would’ve Just Avoided Any Kind of Conflict at All.” Five participants (5/13) spoke explicitly about a fear of “conflict” that kept them from having critical conversations. For example, Elizabeth (a teacher in her 40s with over two decades of teaching experience) simply “avoided any kind of conflict.”

In the past I would've, just avoided any kind of conflict at all and went along with the masses. [Now] I’ve been able to navigate through difficult conversations with parents. I [also] had a mentee who wasn't pulling her weight and she was copying plans from other people and I definitely would not have been able to talk to her about that prior to being a part of this cohort.

For Elizabeth and these other four participants, the notion having critical conversations was so challenging that she would instead just “go along with the masses.” As she put it later, her “fear of confrontation” had kept her from even addressing issues with mentees.

Elizabeth’s new-found voice resulted in less of a fear of conflict and a new ability to “navigate through difficult conversations.”

Challenges in the DILI: Reflecting on Assumptions

All 13 of the DILI completers (13/13) addressed the two major reflection exercises of the DILI, in their interviews. They discussed both the regular journaling they did in each DILI sessions, and they discussed Kegan and Lahey’s (2009) *Immunity to Change map*. This exercise is a developmentally intentional activity that provides a structure for participants to recognize and confront their assumptions. While I believe both journaling and the immunity to change map (Kegan & Lahey, 2009) supported my claim that the DILI provided participants with developmental challenges, for the purposes of this study, I am only counting the five participants (5/13) who factually discussed these activities as challenges. The administrators also spoke of
reflection, and generally how helpful they found it. They did not address how their teachers responded to these teaching activities.

Reflection is a key component of increasing capacity. Drago-Severson (2004a) describes reflecting on assumptions as “essential for the development of lasting change and the successful implementation of new practices” (p. 17).

**Participants on the Challenge of Reflection**

The five DILI completers who spoke of reflecting on their assumptions as a challenge spoke of it as something new and not easy. However, it was not that it was difficult, per se. Rather, it was “awkward” as described by Franny and Angelica. Natale, a non-completer, described how reflecting on her assumptions led her to becoming more self-aware and to her identifying her tendency to be “judgmental.” Two administrators also mentioned reflection as part of their own experience learning in the DILI. For example, Bud, a district administrator, spoke of “critically” reflecting on himself and Nicholas, a building principal, spoke of it as the least helpful aspect of the DILI. I highlight the stories that best demonstrate the ways that participants spoke about reflection as a challenge.

“Journaling was Awkward at First, and Challenging.” Franny, a teacher in her 50s with over two decades of experience, described how although reflecting and journaling was uncomfortable at first, she came to find it helpful in her daily practice as she began to pause and try to understand herself and others better.

I've never been a diary keeper or anything like that. So, for me, journaling was awkward at first, and challenging. In the cohort, we always had time to...reflect and jot in our notebook...I've tried to incorporate that daily – and not only, professionally, but personally as well. [Now I] take that time to say, where was that coming from? Why did I feel this way? Why, did I react this way? I just have a better understanding of myself and other people.
Franny found that journaling helped her to be able to consider others’ perspectives, and recognize her own “feelings and reactions.” Taking time to reflect helped her develop a better understanding of herself as she got past the “awkward and challenging” part of journaling.

“It Was a lot of Looking Within and I Felt Like that's Not Something I Ever Really Did Before.” Similarly, Angelica, a teacher in her 50s with over two decades of experience, described how reflecting was not part of her practice.

It was a lot of looking within and I felt like that's not something I ever really did before. But... [in the DILI] you're given the time and space and tools to really do that...I think a lot of what I got out of cohort was more of an understanding myself and other people.

Angelica came to appreciate the time to reflect. While she didn’t adopt the practice of journaling like Franny did, she found having a better understanding of herself was helpful, since it led her to also understanding others. For both Angelica and Franny reflection was a new practice, and Angelica appreciated the “time, space, and tools” afforded by the DILI that contributed to her increased self-awareness and understanding of others to be valuable attributions for her leadership.

Non-Completers on Reflection

Two of the non-completers shared that the reflective elements of the DILI were supportive to their growth and development (2/3), but did not explicitly discuss it as a challenge. Bud, an administrator in his 50s with over two decades of experience, described the practice as “helpful,” but did not elaborate further. Natale, a teacher in her 50s with over two decades of experience, spoke of how the practice of reflection provided her with the opportunity to challenge her assumptions and further develop her leadership.

You really had the opportunity to go through exercises at the very beginning stages of the cohort and it, really made me focus on, wow, I really can be very judgmental and, need to stop and think before I start, making judgment on people and to understand that the whole
world doesn't exist through what I've experienced. That was the biggest thing I took away. Just realizing and admitting it in my journaling that we did during the cohort.

Natale discussed the “reflective activities” as helping her with “stopping to think” and how she challenged her assumptions, and started to consider ways to be less “judgmental.” Natale also shared how that helped her address a challenge she faced with a colleague.

One of the big challenges that we talked about was… how do we deal with these people that we personally are not really getting along with? We learned to address it and reflect. [I learned] to stop and think first before I start blowing up steam.

Natale described that learning the “tools to be reflective” as “one of the biggest things” that helped her to challenge her assumptions and deal with people she didn’t get along with.

**Administrators on Reflection**

Four of the administrators (4/6) described how the practice of reflection was helpful for their own development. However, they neither spoke of it as a challenge for themselves, nor spoke in any way about the teachers reflecting on/challenging their own assumptions. Rather, they described the reflective activities in the DILI as “helpful,” a time for “critical reflection” and an opportunity to “slow down.”

“**Think Critically About Myself.**” Bud, a district administrator in his 40s with almost two decades of experience, shared that the time to reflect “allowed me to think critically about myself… and to understand the tendencies and behaviors I have. Now I can identify and make corrections or step back and think critically.” For Bud, reflection helped him identify behaviors he wanted to be more “conscious of” as he analyzed his own assumptions and became more self-aware. While Bud, was challenged to “think critically” it is not clear that this was a developmental challenge.

“**More Time than Needed.**” Nicholas, a building administrator in his 40s with over two decades of experience, shared his feelings about reflection, presenting as an outlier because –
unlike to the other administrators— he said the time to reflect was *not helpful*. When asked in his interview about the least helpful part of the DILI, Nicholas explained that dedicating time for reflection was not a typical part of his practice. He stated, “[For me] reflection took at most two minutes.” He found the time dedicated for reflection to be “more than he needed.” While this could be because a developmental challenge made this uncomfortable for him, that might be overreading into what he said.

**Challenges in the DILI: Assuming a Leadership Role**

While I dive deeply into this activity—the central focus of the third year of the DILI—in Chapter VIII, I want to briefly preview it as a developmental challenge here.

All 13 of the DILI completers (13/13) spoke of assuming additional leadership responsibilities at length in their interviews (i.e. introducing teaming protocols to their team, leading professional development, leading a student initiative, or mentoring others). Furthermore, 12 of them (12/13) spoke about the challenges entailed in this work. When they spoke about assuming a leadership role they used various words to describe the challenge it presented to them, including “nerve wracking,” “out of my comfort zone,” and “uncomfortable.” Elizabeth (a teacher in her 40s with over two decades of experience) succinctly summarized the sentiments of the 12 completers, “Before I would've hid, I would've avoided [a leadership role] at all costs. And now, even though it's not completely in my comfort zone, I'm willing to try.”

A leadership role—is defined developmentally—as an invitation to teachers in which teachers are given a “role” to take on and supported with developmental intentionality; this, according to Drago-Severson (2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013), means that the goodness of fit needs to be considered and that support and challenges must be offered to provide an opportunity for the person assuming the
role to grow from the experience. A leadership role—when offered with developmental intentionality—provides both developmental supports and developmental challenges to the person assuming the role (Drago-Severson, 2004a, 2009, 2012a, 2016a). The leadership roles the DILI completers assumed are fully discussed in Chapter VIII.

**Finding 2 Summary: Providing Developmentally Appropriate Challenges**

The DILI was designed to foster its participants’ growth as professionals and teacher leaders by serving as a *holding environment* (Drago-Severson, 2004b, 2009, 2012a, 2016a; Kegan 1994; 2000; Winnicott 1965). Teacher leadership requires not only learning skills and information, but also having opportunities to grow internal capacities (Drago-Severson, 2004a, 2009, 2012a, 2016a; Wagner, 2006). Therefore, the DILI pushed its participants to confront and engage with developmental challenges, even as it provided developmentally appropriate supports to aid and (more colloquially) support them. The DILI completers acknowledged these challenges in their interviews as they spoke of the DILI practices of reflecting on assumptions (5/13), their work on *critical conversations* (12/13), and accepting additional responsibility as they assumed new leadership in their schools (12/13).

A third way the DILI served as a holding environment was by staying in place.

**Finding 3: The DILI Served as Holding Environment: Staying in Place**

**Supporting One Another’s Work Across the District**

The third way the DILI served as a holding environment was the way it stayed in place and provided longitudinal support and challenges, over time—both *in and beyond* the DILI. As the teachers in this study transferred their learnings, and assumed greater leadership roles (including leading professional development and introducing teaming protocols) they shared
stories of leaning on the support of the DILI to assist them in overcoming personal fears and resistance from peers. As I discuss fully in Chapter VIII, all 13 DILI completers transferred their learnings from the DILI to assume greater leadership responsibilities. The teachers and administrators shared that the notion of teacher leadership was new for the MELC School District. Thus, the teacher leaders’ work represented a shift in cultural norms. As discussed in Chapter II, this shift in culture is necessary for schools to be able to meet today’s pressing challenges including many of the mixed and adaptive obstacles facing educators today (Drago-Severson, 2016a; Wagner et al., 2006). Yet teacher leadership goes against longstanding school cultures of egalitarianism, or a culture of sameness (Katzenmoyer & Moller, 2009; Murphy, 2005; Wagner et al., 2006). Egalitarian norms are cited as one of the largest barriers to teacher leadership (Wenner & Campbell, 2016). The 13 teacher leaders in this study reported important challenges in assuming acts of leadership, including overcoming personal fears (13/13) and resistance from their peers (10/13). As they faced challenges, all 13 DILI completers reported that they looked to others in the cohort for support. They also extended support to others in the cohort as they worked together to overcome their challenges. A second way the holding environment stayed in place was when the DILI completers began to “try out” leadership they would also seek out administrators for feedback and coaching (7/13).

The Support of the Cohort: Support that Stays in Place

The 13 DILI completers extended the holding environment beyond the DILI in different ways. First, they extended the support of the DILI to each other as they assumed greater acts of leadership across the district. Specifically, the teacher leaders extended the holding environment and support provided when (a) implementing teaming protocols (Drago-Severson, 2009, 2012a, 2016) and overcoming resistance with the support of teammates and (b) working together to lead
professional development. I incorporate feedback from the six administrators who noted how the partnerships formed in the DILI supported their teachers’ assumption of leadership responsibilities. They were not specifically asked about the teacher leaders’ relationships outside of the cohort, but these partnerships were so important that it came up organically in all six interviews (6/6). In fact, the six administrators also noted that the teacher leaders who had the support of another member of the DILI on their team were “more successful” in transferring their learnings and assuming leadership than those who did not have the partnership support (6/6).

**Extending the Holding Environment: Grade Level Partnerships**

The cohort provided a holding environment that *stayed in place* as the participants extended support to each other when they transferred their learnings from the DILI to their practice and assumed additional leadership responsibilities (i.e., introducing teaming protocols and/or leading professional development). This proved especially helpful as the DILI completers worked together as partners and offered sustained support to each other to overcome the resistance they faced from other teachers (11/13); which was also described by all of the administrators (6/6). The primary context for this resistance was when the DILI completers worked together as partners and introduced teaming protocols, transferring them from the DILI to their grade level teams in their schools. These partnerships occurred between fellow members of the same grade level team who were both part of the DILI cohort. The partnerships grew into a collaborative mechanism for support. This was especially valuable when they needed to manage the resistance they faced from other teachers on their grade level teams.

For this finding I will highlight the stories of partnership that emerged from my analysis. To do so, I offer the experiences of Cathy, Gabriella, and Rosa since they raised themes that appeared in others’ stories of having a “partner” and are the most representative examples. I
define these partnerships as two or more colleagues from the DILI worked together to execute acts of teacher leadership. Cathy shared how “strength in numbers” helped her to overcome resistance on her team. Gabriella and her partner “practiced critical conversations” as a way to “reframe the culture of the team.” Rosa worked with her partner to “support each other’s growth.” I also highlight how one of the non-completers, Anne could not transfer her learnings back to her grade level team in her schools because, “You need support from others on your team.” To protect confidentiality, as I share the participants’ stories of partnership, I will not use both partners’ pseudonyms, to conceal potentially identifying information about who they are in the MELC district.

Partnership 1: “Speaking the Same Language. It helps to push through those difficult moments.”

The majority of participants (11/13) described the holding environment of the DILI as staying in place. It stayed in place in the way the participants used partnerships to extend the support of the DILI to each other’s leadership practice beyond the DILI itself.

Lesson: Overcoming Resistance on Teams

Cathy, a teacher in her 50s with almost three decades of teaching experience, described how she felt that for her, working with other DILI completers on her team “offers support.” Cathy shared an example of how she tried to introduce taking a team survey to identify her team’s strengths and areas of growth. Her team responded with resistance. But Cathy noted how having other members of the DILI who could speak “the same language” was “helpful” during those difficult moments.

Having other people who've been on leadership, on the [grade level] team offers support, in many ways because you speak the same language and, you feel supported…If you're having to have a difficult conversation they can help out with the conversations…Or, in general just knowing that they're there and they support what we're all trying to do is very
It helps to push through those difficult moments. [For example] ...on our team when we wanted to take a survey, and [other team members] asked, “Why do I have to do a survey?” and “Who's [going to] see it?” and this and that and it helped to have the support. That's really what it boils down to.

Cathy described that she faced “difficulty” when she tried to introduce a team survey. Having other members of the cohort on her team made her feel “supported” as they shared their common goals and “the same language” with the team. She felt her partner had her “back” and helped with “difficult conversations” and “pushing through those difficult moments.” Cathy concluded by noting “there is strength in numbers.” Cathy and her teammates extended their support and the holding environment to each other as they assumed acts of leadership.

Nicholas, a building principal in his 40s with over two decades of experience, also noticed how having others on the team helped the DILI completers transfer teaming protocols. “I saw the comradery that was established at leadership because – I'll be honest – I don't think [Cathy and the others DILI completers on her team] were more than just colleagues before that.” Nicholas noticed that, for Cathy and others, developing stronger relationships, being “more than just colleagues” was helpful as their comradery extended beyond the DILI and became an extension of support to their work as teacher leaders.

**Partnership 2: “To Reframe the Culture of Our Team.”**

**Lesson: A Partnership to Rehearse Difficult Conversations**

Similar to Cathy, Gabriella, a teacher in her 50s with almost three decades of teaching experience, described how her grade level team had “one bad apple who took over.” Gabriella shared how she worked with another member from the DILI and they would introduce the teaming protocols they learned about in the DILI including planning how to respond to the resistance they anticipated.
It really, helped, us to be able...to reframe the culture of our team. By setting norms, it made our time more productive, but also at the same time [I came to] understand that it wouldn't happen magically and that we would have to have some difficult conversations and [we would] practice the scripts for those difficult conversations.

Gabriella and her partner worked together to “reframe the culture” of their team. Gabriella noted that in order to do this, she worked with her partner to plan not just how to introduce having team norms (Drago-Severson, 2009), but how to overcome resistance. They did this by creating scripts and practicing their critical conversations. By extending the support of the DILI to one another as they transferred their learnings they were able to overcome the challenge of the “one bad apple.”

Elmer and Francis. Elmer, a district level administrator, in his 50s with over two decades of experience, noticed how, for Gabriella, “having someone on her team who was also going through the same program, and knowing that she had someone else on board with her was a great [source of] confidence.” While Elmer noticed gains in confidence, Francis, a principal in his 50s with over two decades of experience, described the way the partnership extended the support of the holding environment to help both Gabriella and her partner overcome resistance.

In the leadership cohort, there is a common understanding about what helps kids learn. Because of those commonalities, I think it has helped [them both] become stronger leaders, stronger teachers, and just better proponents for the kids that are in our building.

Francis mentioned the “common language and common understanding” established in the DILI as a pillar of support for the teachers. This was an emic code or the exact words of the participants, and this same language was also used by Cathy as she described how her DILI teammates supported each other. Similarly, Gabriella shared that the “tools and language” helped her and her partner transfer their learnings from the DILI by supporting each other's leadership. Francis described that this extension of the holding environment resulted in both of them becoming “stronger leaders, teachers, and better proponents for the kids.”
Partnership 3: “A Wonderful Opportunity For Us to Actually, Help Each Other to Grow.”

Lesson: Helping Each Other Learn, Apply, and Grow

Like Cathy and Gabriella, Rosa—a teacher in her 50s with two decades of experience, summarized the importance of having a partner in the DILI and on her grade level team as helpful for her own learning. Rosa shared that after each monthly DILI session she would meet with her partner to discuss how they could bring this work back to their team. Rosa found that this led to them being able to “help each other grow.”

I think the one great thing about the two of us being together in the leadership cohort is that we could share so much of our experiences together. And, that was very helpful because we have a mutual respect for each other. I think being together and learning through this process for three years…was a wonderful opportunity for us to actually, help each other to grow.

Rosa’s experience of having a partner who learned alongside her in the DILI meetings was helpful as they extended their learning. Rosa concluded by saying “at the end of every session we would meet and plan how to bring this back to our school.” Thus, they “helped each other to grow.”

Nicholas and Elmer. Nicholas, a building principal, noticed how Rosa and her partner worked together to “push themselves out of their comfort zone.” Nicholas described how the partnership extended the holding environment in the DILI as they took risks and supported one another. Similarly, Elmer (a district administrator) commented on the value of this particular partnership, saying that it benefited both Rosa, her partner, and the district as a whole:

You've got [Rosa and her partner] taking a lot of the things that they’ve learned and trying to turnkey it. They're bouncing things off each other saying, this is what we're trying on our team, and after, and in between every session they have tried to implement...a lot of the things that we talk about [in the DILI]. They are both excited about bringing information back...to their building and to the people they work with – whether it be their team or whether it just be...in everyday conversation with somebody [else] in their building. I think they're both in a really good place and helping our district move the culture where we want it today.
Elmer also noticed that for Rosa and her partner, their support of each other resulted in the way they “took a lot of things they learned and turnkeyed it” and this brought “an excitement back to their buildings.” He felt as though their work and teacher leadership ultimately helped “move the culture” of the district. As told by Rosa, Nicholas, and Elmer, Rosa’s partnership was an important extension of the holding environment that allowed them to synthesize more of their learnings, and push themselves “out of their comfort zone” through their collective acts of leadership.

**Non-Completers.** Interestingly, none of the three non-completers had fellow DILI participants on their grade level teams at the time that they dropped out of the institute. Anne was the only non-completer who attempted to transfer learnings from the DILI to her grade level team; and, like the DILI completers, she too faced resistance. She did not have a partner to turn to for support and she specifically cited lack of support as one of the reasons why she quit the DILI.

We learned about creating safe spaces and norms and communication and being vulnerable in that first year [in the DILI]. But then it was really difficult for my teammates to be open to understanding it and also, maybe there was resentment from other people…They weren't responding very well with it. People weren’t being honest everyone would act like, everything’s fine. It wasn't fine…You need support from others on your team, so maybe if there was two of us from each team it would be more effective.

Anne shared that she was “really struggling with [my team] not wanting to be open to [new strategies from the cohort]” and described that she felt a “need for support from others on the team.” As mentioned earlier, Anne was unable to overcome the resistance she faced, and the lack of support from her grade level teammates that resulted in feelings of frustration, failed attempts at teacher leadership, and her dropping out of the DILI.

The power of egalitarian norms are longstanding barriers to teacher leadership (Katzenmoyer & Moller, 2009; Wenner & Campbell, 2017). The teachers in this study described
facing resistance from their peers. However, Cathy, Gabriella, and Rosa, shared stories of partnerships as a way to extend the support of the DILI to each other, and in doing so overcame resistance and supported one another in assuming teacher leadership.

**Seeking Coaching and Administrator Support when Enacting Teacher Leadership**

Eleven of the DILI completers (11/13) reported that a second way the holding environment of the DILI stayed in place was in the ways the teachers’ administrators extended support to them in their respective schools. Seven of the completers (7/13) sought out coaching support from their administrators as they started to assume acts of leadership in their schools as shown in Table 16.

**Table 16**

<table>
<thead>
<tr>
<th>Administrator Support</th>
<th>Number of Participants</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning alongside the administrators provided support for teacher leadership.</td>
<td>11</td>
<td>Gabriella, Theresa*, Katie*, Rosa*, Mary*,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Elizabeth*, Fatima*, Edith*, Emma, Franny, Joan*</td>
</tr>
<tr>
<td>Sought out admin for coaching support when “trying out” teacher leadership.</td>
<td>7</td>
<td>Rosa*, Joan*, Edith*, Fatima*, Theresa, Elizabeth*, Mary*</td>
</tr>
</tbody>
</table>

*Denotes both types of support reported.

To elaborate on this claim, I share the stories of two of the seven participants whose responses demonstrated the variation of support the teachers accessed from their administrators. First I share how Joan, a teacher in her 30s with half a decade of teaching experience, checked in with her administrators, when she had “to do something unpopular.” I then discuss how Edith, a teacher in her 30s with half a decade of teaching experience, felt “confused” and asked for an administrator to come to a team meeting and model how to set norms with her team. I selected these participants because they showed the range of support that the 11 participants reported.
**Joan Checked In**

Joan offered a typical description of administrative support, as she reported how the DILI stayed in place as she leaned on her administrators, “my principal's super supportive of me and, there’s another supervisor who I also speak with. So sometimes that's helpful when I have to do something that's unpopular or if I don't agree with something.” For Joan, knowing that the administrative team supported her helped her to do what she felt was right, even if it would not be “popular” and therefore difficult.

**Edith Asked for More Active Support**

Unlike Joan, Edith specifically asked for coaching from her administrators. She described how the support of the administration that stayed in place made her feel more confident in herself. She often made appointments with her building principal or the facilitator to plan conversations, team meetings, or ask for advice, especially when she faced resistance. In fact, for Edith, she relied on the extension of this support more than others, as she was the only one to ask the facilitator to come to a team meeting to help her introduce the teaming protocols she learned in the DILI.

I was confused about norms and thought why do we even need to do this? But then I saw other teams using them and even our principal and that made it more helpful to understand. Then the facilitator came to our team meetings and helped me and my team create norms for the year and edit them, and this was super helpful and I still use this to this day.

For Edith, the holding environment of the DILI stayed in place through continued support from the administrators including frequent check ins with her building principal and the facilitator.

Seven participants including Joan and Edith, spoke about how their administrators’ support stayed in place and this aided them as they assumed acts of teacher leadership.
A second way that the DILI participants sought the administrators’ support was when they led professional development.

**Extending the Support of Administrators to Lead Professional Development**

Eleven participants assumed additional leadership by leading professional development. All 11 (11/13) described how leading professional development for their peers was a challenge at first. Six of them (6/13) shared how they turned toward their administrators for support. Fatima, a teacher in her 50s with two decades of experience, and Elizabeth, a teacher in her 40s with over two decades of experience, best articulated how at first, leading professional development in front of their peers was “nerve wracking and out of their comfort zone,” and how their administrators aided them in feeling “more confident.”

“*The support* made us more confident because the other teacher and I were very scared…”

Fatima described how leading professional development seemed like “another thing” thrown at them, and how she turned to her administrators for support.

[The support] made us more confident because the other teacher and I were very scared…. It is scary presenting in front of all of your colleagues and it just made it so much easier for us. And those little things… really made a difference and put a smile on my face and made me feel more confident.

When Fatima was presented with a challenge to lead professional development she felt “scared.” However, Fatima found the support she experienced from her administrators in the DILI and beyond “really made a difference” as she assumed leadership in new ways.

“I was Way Out of My Comfort Zone and it was Such a Challenge for Me.”

Similarly, Elizabeth noted feeling apprehensive before leading professional development. She stated, “I had to accept the fact that this wasn’t something I would be comfortable with, I was way out of my comfort zone and it was such a challenge for me but in the end it was worth it.” Elizabeth shared that she was “out of my comfort zone.” Yet, she also described how she
received administrative help in the form of coaching, and additional planning time, and this extended the holding environment in the DILI to provide support and challenge that led her to conclude “it was also worth it.”

Eleven participants (11/13) described how leading professional development was “scary” and “out of their comfort zone.” They relied on the holding environment of the DILI that stayed in place as they turned to their colleagues for support (11/13). Six participants (6/13) also sought out administrators for additional coaching, confidence-boosting, or support when they had questions, self-doubt, or faced resistance.

Chapter Summary

In this chapter, I shared how all 13 teacher leaders spoke of the importance of feeling supported in the DILI environment in two ways. First, it was important to their own learning. Second, it was important to their leadership practice. The importance of a supportive environment – which contributed to the DILI acting as a holding environment – was further reinforced by the six administrators who participated alongside their teachers, as well as the three non-completers who participated in just one or two years of the DILI. All 22 participants felt comfortable learning, reflecting, and/or taking risks in the DILI. Throughout the course of the three-year DILI, the participants described that the holding environment of the DILI – a) provided support; b) challenged them; c) stayed in place, and that this was important for their leadership. The trust and confidence that they gained during their sessions led to deeper learning and increased their ability to be vulnerable – itself a critical prerequisite to truly effective leadership development (Brown, 2018). The teacher leaders then carried that trust and confidence as they extended their support and held each other while they performed acts of teacher leadership in their schools – including introducing what they learned in the DILI to their
colleagues. Thus, not only was the holding environment important for participants in learning, but it was also important for them when it came to their actions of teacher leadership. This support was especially critical when they faced resistance and worked to overcome egalitarian norms. Finally, the support of the administration emerged as a key element that contributed to the holding environment and was critical to ensuring that teacher leadership flourished.

Three big themes that emerged from the participants’ descriptions of their experience in the holding environment of the DILI are as follows:

- It was important for the participants to feel held or supported so that they could truly learn and engage in activities of reflection, role playing, and various protocols.
- The participants extended the support of the DILI holding environment to each other and worked together to transfer their learnings from the DILI into actions of teacher leadership.
- The DILI experience laid the foundation for them to want to extend support to others as they assumed greater responsibility as leaders.

In the next chapter (Chapter VII), I explain my second key finding: that the opportunities to learn, reflect, take risks, and engage in developmentally intentional exercises in the DILI led to changes in the participants’ perspectives. It is important to note, however, that this was an aftereffect of the holding environment. Again, in the following chapter, I will explain how all 13 of the DILI completers reported that learning about adult developmental theory, the ways of knowing, and developmental diversity helped them to reshape their perspectives, including their view of themselves and how they saw other people (i.e., their colleagues, administrators, the parent community, and even members of their own family).
CHAPTER VII: LEARNING IN THE DILI LED TO THREE SHIFTS IN PERSPECTIVE

“If you change the way you look at things, the things you look at change.”- Wayne Dyer

In this chapter I discuss findings that emerged in response to the first half of my second research question: *How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities?* Findings that emerged from the second part of this research question are fully answered in Chapter VIII. In other words, in this chapter I explore how learning in the DILI influenced participants to shift or change their perspectives in three distinct ways.

- **Perspective Shift #1:** DILI completers (13/13) reported that learning about adult development and Learning-Oriented Leadership in the DILI helped them to shift their perspective on themselves and others.

- **Perspective Shift #2:** DILI completers (13/13) reported shifting their perspective from not valuing collaboration to finding collaboration to be helpful in working together to divide the work load, solve problems, and support others.

- **Perspective Shift #3:** DILI completers (10/13) reported shifting their perspective on what leadership is and what it means to them.

Through my analysis I found that learning about adult development and developmental diversity proved important to all 13 teacher leaders (13/13) who completed the DILI. These participants reported that, to greater and lesser degrees, learning about Learning-Oriented Leadership and the ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a) reshaped their perspectives and understanding of different aspects of their practice, including how they
thought about leadership and the potential of collaboration. These ideas from Drago-Severson's Learning-Oriented Leadership constituted a major element of the DILI curriculum. This included the prospect that adults see the world and their experiences differently (i.e., developmental diversity) through different ways of knowing, and how to support and stretch adults—in the developmental sense—with each of the four primary meaning making systems (Drago-Severson, 2004a, 2009, 2012a, 2016a). These ideas are based on 40 years of research (Drago-Severson, 2004a, 2012a, 2016a; Kegan, 1982; Kegan & Lahey, 2016).

In the first section, I share how participants (13/13) reported that learning about adult development, developmental diversity, and ways of knowing shifted their perspective. As they learned Learning-Oriented Leadership in the DILI they came to understand themselves and other adults in new ways. In other words, because of what they learned they explained that they shifted how they viewed their colleagues and how a developmental lens helped them to understand that adults experience the world with different meaning making systems and have the potential to grow and evolve. In the second section, I discuss how participants (13/13) described how their learnings in the DILI shifted their perspective about collaboration as they came to value working with others in new ways (i.e., co-planning lessons, discussing student data, and effectively sharing responsibilities). In the third section, I discuss how participants (10/13) who completed the DILI shifted their conception of leadership as they learned how to better support and care for other adults and came to view themselves as leaders.

As shifting the way, one thinks is deeply personal and can only be told by the individual who is telling their story, this chapter does not follow the same structure as my other findings chapters (VI and VIII). I focus exclusively on the teacher participants' experiences of learning and shifting their perspectives and do not incorporate the administrators’ perspectives on this.
While my interviews did not directly/explicitly ask participants if they shifted their perspective about adult development, leadership roles, and collaboration (Drago-Severson, 2004a, 2009, 2012a, 2016a), these three findings emerged from my analyses of the DILI completers self-reports about how they shifted their thinking and began to see themselves and others (i.e., their colleagues and supervisors) differently after participating in the DILI and learning in it. The non-completers (i.e., the three participants who did not participate in all three years of the DILI programming) did not share as much about their learnings from the DILI. In fact, only one of the three non-completers reported a shift in her perspective (1/3). Therefore, I only introduce the non-completers’ experiences where appropriate and explain how their experiences either fit with or differed from the patterns that emerged from those who completed the DILI.

**Perspective Shift 1: A New View on Themselves and Others**

All of the DILI completers (13/13) emphasized that learning about Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) in the DILI helped them to change their views on adults and the potential for development in adulthood. That is, i) learning about adult development (e.g., developmental diversity and ways of knowing), ii) why it matters, iii) how adults – including themselves – make sense of the world in different ways, and iv) the importance of attending to developmental diversity made a difference to them in their work and beyond. Not only did their views change, but as I discuss below, they felt they changed – *on the inside* – and this mattered a great deal to them. This shifted the way they viewed themselves, other adults, leadership, and the way they collaborated with others. All of these shifts supported the DILI completers in transferring their learnings to acts of teacher leadership (i.e., assuming new leadership responsibilities such as leading professional development, introducing teaming protocols, and mentoring others).
In this section, I explore my finding that each of the 13 DILI completers reported that learning about adult development, developmental diversity, and ways of knowing shifted the ways that they saw and understood themselves and others. All 13 of these participants said that learning about the ways of knowing – particularly about developmental diversity and understanding its importance – helped them to reshape their perspectives in ways that they said helped them to better understand themselves and others, which was supportive for their practice as teacher leaders.

It is important to note, though, that while all 13 teachers discussed their new understandings of adult development and how their new understandings further changed their perspectives, what they said, the degree to which they emphasized it, and how it mattered to them varied. All of the participants said that learning about adult development in the DILI provided them with a greater understanding of developmental diversity and self-awareness (13/13). These findings were made up of three sub-shifts. Some (5/13) also spoke of seeing differences in opinions and disagreements through a developmental lens, rather than as personal slights. They explained that this was an important change for them. I call this new perspective differentiating to depersonalize. Others (7/13) spoke of how their newfound knowledge of developmental diversity helped them to better communicate with different people (e.g., colleagues) – trying to meet individuals “where they are” (i.e., in their meaning making/way knowing; Drago-Severson, 2004a, 2009, 2012a, 2016a). Table 17 shows the number of participants who discussed each of these perspective changes.
Table 17

*Participants Who Expressed that Learning about Development and Developmental Diversity Induced Perspective Shifts*

<table>
<thead>
<tr>
<th>Type of Sub-Shift</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Differentiating to Depersonalize</td>
<td>5</td>
<td>Ro, Emma, Patricia, Katie, Angelica</td>
</tr>
<tr>
<td>Adjusting Communication</td>
<td>7</td>
<td>Patricia, Franny, Cathy, Gabriella, Fatima, Joan, &amp; Edith</td>
</tr>
<tr>
<td>Increasing Self-Awareness</td>
<td>13</td>
<td>Elizabeth, Mary, Ro, Katie, Angelica, Emma, Patricia, Franny, Cathy, Gabriella, Joan, &amp; Edith</td>
</tr>
</tbody>
</table>

Table 17 shows that several participants emphasized different kinds of changes in perspectives. To illuminate the claim that learning about adult development, ways of knowing, and developmental diversity helped 13 teacher leaders shift their perspectives and view of themselves and others, I discuss self-awareness in the context of the other two sub-shifts. I present the 13 participants’ reports of increased self-awareness embedded throughout my discussion of *differentiating to depersonalize* and *adjusting communication*. Throughout this chapter I present the experiences of the teacher leader participants whose stories best capture the similarities and differences voiced by the participants who express changes in each category.

The foundational sub-shift of this perspective change centered on how the DILI helped all 13 participants (13/13) become more self-aware as they also learned about developmental diversity. When directly asked, “Can you describe if there was anything you specifically learned that you incorporated into your practice as a teacher and teacher leader?” They reported that learning about the different ways in which adults make sense of their experiences was important. For example, learning about ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a; Kegan, 1982, 1994) helped them to become more aware of themselves, more aware of their
actions, and more aware of the ways they interacted with others. The participants spoke of how this learning was helpful for their practice as teacher leaders (13/13).

I discuss the other two sub-shifts (i.e., regarding their relationship to collaboration and regarding their view of leaders) next.

**Sub-Shift 1.1: Differentiating to Depersonalize**

“It's not, them versus me. I just have to re-present it in a different way.” - Fatima

Five teacher participants (5/13) who completed the DILI emphasized that their perspective on why others differed from them changed. Previously they took differences in opinion, differences in approaches to work, and differences in response to specific situations “personally.” That is, they would be hurt by or offended by these differences. These five participants said that as they learned about the ways of knowing, they came to understand that the reason others responded differently was because they made sense of the world with different lenses (i.e., ways of knowing). Their perspective shifted from being hurt or offended, to coming to understand and appreciate these developmental differences as an alternative way to “see” things, and as examples of developmental diversity rather than personal slights. I refer to this as depersonalizing differences because the participants described how this change helped them to “depersonalize” (i.e., not take others’ responses or actions that differ from their own stance “personally”). For these participants, depersonalizing differences represented a shift in their perspective as they saw other adults and themselves differently which was important for their leadership development including managing the challenges that arose in their practice as teacher leaders.

Participants spoke about depersonalizing differences in two ways. First, because they were able to “depersonalize” differences, they were better equipped to “better understand others”
especially those who were different” (5/13). As Emma said, “I was able to consider their way of knowing, which helps me to not personalize things.” Second, two of the participants said that depersonalizing differences allowed them to let go of perceived “conflict” that kept them from feeling accepted (2/13). As noted throughout this chapter, this was not a direct interview question and the other nine participants did not share that they previously struggled with differences as being personal. To highlight this sub-finding I explain how Emma and Fatima changed their perspective and came to understand others and how this change allowed Katie and Angelica to identify long held assumptions about not fitting in with their colleagues. Questioning these assumptions ultimately helped Katie and Angelica to find a sense of belonging that they had never experienced before. Seeing differences through a developmental lens proved an important tool for these five participant’s leadership practices, as their perspective shifted and they were better able to “understand” their colleagues.

“They’re Not Being Mean to Me, I Have to do Something Different.”

Fatima, a teacher in her 50s with two decades of teaching experience, spoke of using her knowledge of developmental diversity to see resistance from a developmental perspective. Typical of these five participants, Fatima shared how she used to respond when someone did not appreciate her ideas and how she shifted her perspective and actions after learning in the DILI.

If I asked someone something and they would shut down, I would go, “Okay, they're not being mean to me. Maybe I needed to present something in a different way. I have to do something else to help them recognize that what I gave them is useful.” In the past I jumped to assumptions. My initial reaction in the past would be, “Oh, he said, ‘No,’ he's being difficult. I gave this to them. Why aren't they using it? Why aren't they taking my suggestion?” [Now,] I step back and reflect and think about why a person would respond in such a negative way? I'm recognizing that [instead] I have to do something else.

As illustrated in the quotation above, Fatima described how learning about the ways of knowing in the DILI was powerful and that she used her new developmental lens to understand and
support others, instead of seeing their response as “being mean.” As opposed to “shutting down,” as she would in the past, she now tries to “present it in a different way” or does “something else to help.” This is important, as teacher leaders are responsible for sharing best practices and offering assistance to other teachers (Curtis, 2013; Muijs & Harris, 2006; Weiner & Woulfin, 2018). Therefore, understanding colleagues’ actions and motivations as a way to best support others was helpful to Fatima’s leadership practice. She described how she began to reframe what she used to see as resistance, to instead consider the developmental need at play. She shifted her perspective from feeling as though others were being mean (i.e. personalizing it) to trying to understand how to support them. For Fatima, this realization helped her to be more supportive to the needs of others in her care.

“Understanding that there are Differences Truly Helped Me in Relating to My Colleagues.”

Katie, a teacher in her 40s with over two decades of experience reflected on how learning about developmental diversity gave her an ability to view herself and others differently. Katie uniquely put this in self-critical terms.

The thing that really changed me so much was [understanding that others were] making sense of the world with different ways of knowing… I always had seen the world from my lens and – not to toot my horn or anything – I just always thought my way was the right way. I was able to see that, no one's right or wrong. It’s just people have different ways of knowing. And that was big for me. Keeping that in mind has helped me so much in communicating with others [and in] understanding others. Before, I always saw myself as the one who knew it all. And understanding that there are differences truly helped me in relating to my colleagues and… understanding them better.

Learning about ways of knowing in the DILI was powerful for Katie. She described how it “helped” her “so much in communicating with [and in] understanding others.” Katie explained that before, she felt she “was the one who knew it all” and after learning in the DILI her perspective shifted. She realized that there was more than one way to approach the work of teaching, and she depersonalized differences as she shifted the way she saw others who did not
approach work in the same way she did. Before learning in the DILI, Katie’s perspective on others was based on her view only, and she thought “my way is the right way.” However, after learning in DILI, Katie’s perspective shifted to understanding that there was not a “right or wrong” way to approach things, but just “differences.” Katie came to reflect on this learning as she recognized her own long held assumption.

I was in that mindset of, I know it all and this is the way it should be done. Everyone should be following this and should be working as hard as me. It’s still a process. I think before I was more standoffish, but now I feel like because I’m showing some more understanding, it [has] improved my relationship with them as well.

Katie’s perspective shifted in a big way as she began believing others could contribute, even if it was different from her worldview. Instead of assuming that she “knew it all,” Katie learned about the ways of knowing, adult development, and developmental diversity which enabled her to change her perspective, which she linked to questioning her old “mindset.” This helped her to build relationships and strengthen her connection with others, which also supported her role as a teacher leader.

Katie further explained that she saw how her own assumptions about “knowing it all” was not only affecting her relationship with colleagues at work, but also her personal relationships – including conflicts with her family.

I always felt like I was misunderstood...in my family and I would ask, “Why don't they get me?” And we just always seem to have a conflict or they just didn't really want to be around me and I never understood it. But when I tried to understand their way of knowing and where they're coming from, I feel like our relationships just transformed. They want to spend time with me. They want to go out with me.

Katie utilized a developmental lens to better understand the viewpoints of others. In addition, she shared how this powerful recognition led to improved relationships – both professional and personal – and her new feeling that her family members “wanted” to be with her.
Angelica amplified this precise point, illustrating how meaningful this lesson was to her. “I felt left out and then I realized that maybe I wasn't being left out. It was just that they were kind of coming from a different perspective and I had to learn to deal with that.”

For Angelica, Katie, and three other DILI completers, learning about developmental diversity and being able to depersonalize differences helped them to challenge their own long held assumptions (e.g., Katie “knowing it all”), to reflect on how their prior beliefs and assumptions influenced the ways they acted towards others and to reflect on how others including – colleagues and family – responded to them. This echoes similar findings that found that as teachers and administrators studied adult developmental theory, they developed a better understanding of others (Drago-Severson, Blum-DeStefano, & Asghar, 2013; Kanarek, 2020).

For these five participants, learning about developmental diversity and the ways of knowing in the DILI allowed them to change their perspective as they reported that they grew in self-awareness and came to better “understand others.” They shared how having a better understanding of themselves and the developmental differences of adults, helped them to better see differences that arose in a more positive lens including: different stances, approaches, and opinions, and they no longer took these differences “personally.” They shared how they came to realize that there was not a right or wrong approach but rather different approaches to work and life, and when others responded differently it was not a personal slight. For example, Katie and Angelica explained that they reflected on assumptions and became more collegial and accepting of others. Fatima and Emma used the ways of knowing to understand different responses and be more supportive to others. For these teacher leaders, they were able to depersonalize differences and in turn better understand and support others.
Next, I discuss how learning in the DILI helped seven of the 13 participants utilize their newfound knowledge to vary their methods of communication as they shifted their perspective on adult development, ways of knowing, and developmental diversity (7/13).

Sub-Shift 1.2: Perspective Shift & More Than One Way to Communicate

“The greatest difference I noticed from my practice as a teacher leader is that, now I have the tools that I need to understand [not just] myself better, but also my colleagues. Before, I would have just had one set approach to something and now I try to approach it in different ways based on the ways of knowing.” - Mary

In this subsection, I explore how new knowledge of developmental diversity led participants to vary their methods of communication. Seven DILI completers (7/13) volunteered that they differentiated the way they “asked questions” and communicated to be more supportive of others’ ways of knowing. The other six DILI completers also spoke about communications with others but did not explicitly link it to adult development and the ways of knowing. The seven participants who did link these learnings to their new communication strategies said that they were “purposeful” in their communication with others by varying their approach to "better meet” each person’s needs based on their ways of knowing. To show how these teachers applied this learning, I share the experiences of Patricia and Franny, who were clearest in linking new communication strategies to others’ ways of knowing as a way to support others in their work as leaders. Two other DILI completers spoke at a similar length about this idea, while the other three addressed it more briefly.

“I'll Try to Plan How I Can Deliver the Message in a way That's Comfortable for Them.”

Patricia, a teacher in her 30s with over a decade of experience, shared how she grew in self-awareness and used her knowledge of developmental diversity as a tool to shift her perspective on the way she viewed herself and other adults. She shared that learning in the DILI helped her to not just “better understand others” but to reconsider how her “actions or words
might be perceived by others” as she began to reconsider her assumptions and vary her
communication approach. She shared:

Learning the different ways of knowing helped me to [not only understand myself] personally, but also, other adults that I work with or, family and friends. You start to understand people better who maybe you didn't quite understand before – why they approach things a certain way. People who aren't as quick to say “Yes” and take everything on and go with the flow. So rather than always thinking “Maybe those people were negative or resistant,” it helped me better understand them and their way of knowing. It made me feel like I can relate to them better. The first thing I took from [the DILI] was I used [the ways of knowing] to look within, and know what kind of teammate and colleague I am, and how some of my actions or words might be perceived by others and how… my way of knowing could be a strength or a limitation, and also trying to better see things from their perspective and support them in a way that's comfortable for them.

In this passage, Patricia described how she used her newfound self-awareness to
differentiate her approach when working with others and thus better communicated with
colleagues who had varying ways of knowing – especially those whom she “didn’t quite understand before.” Patricia began to consider how to best “support them.” She did this by being more aware of her own “actions or words and limitations,” and used her new-found self-awareness of her own personal meaning making system to better communicate with others as she began to consider “how some of my actions might be perceived by others” and consciously made an effort to communicate in a way that would “make others comfortable.” This is important because a meaning-making system, or a way of knowing, has both developmental strengths—internal capacities—and limitations—areas of growth (Drago-Severson, 2004a, 2009, 2012a, 2016a). Thus, while participating in the DILI, Patricia began to better recognize how she viewed and approached the world and her own strengths and limitations as a person, teacher, and colleague.

Patricia’s newfound self-awareness and understanding of adult development led to a change in perspective and what she described as adjustments in her communication.
When colleagues are having difficulty with something, I just try to help them think of strategies and things that can help them. Sometimes I'll just take things in, but then I'll try to plan how I can deliver the message in a way that's comfortable for them and, still [be] effective.

Patricia adjusted her perspective in a way that allowed her to “deliver the message” more “effective[ly].” That is, “in a way that’s more comfortable for them.” This enabled her to be more supportive of colleagues who are “having difficulty with something.” Patricia linked her learning about adult development and developmental diversity in the DILI to a shift in her perspective about why others are not just like her. She contributed this to a shift in the way she now communicates with others.

“A Better Communicator and Therefore a Better Leader."

Franny, a teacher in her 50s with over two decades of teaching experience, shared how as she learned in the DILI she became more understanding of herself and was able to adjust her communication to be of more support to her colleagues’ ways of knowing, in a similar way as Patricia. Franny shared that she felt as though there was a direct link between “understanding my own perspective” (i.e., way of knowing) and being able to “understand other peoples’ ways of knowing.”

A lot of my growth over the last three years and the biggest takeaway is the ways of knowing and understanding other people’s perspective, understanding my own perspective, and my way of dealing with things and where that’s coming from. I think we all became more comfortable with ourselves. I recognized my [own] and other peoples’ way of knowing. [Now] I’m able to understand other peoples’ way of knowing and adjust my communication, my leadership style, to try to get that in sync, [and to] be a better communicator and therefore a better leader. So that was really powerful.

Franny linked both “understanding other people’s perspective” and “understanding my own perspective” to an improved “[teacher] leadership style.” Franny stated that she utilized her learnings and did this by “getting in sync” with others as a way to improve her communication. This was similar to six participants who spoke of matching their questions, prompts, and
feedback to others’ ways of knowing. Franny shared how the DILI curriculum strengthened her understanding of the different ways in which adults, including herself, navigate the world and influenced her ability to lead and support others as she described herself as a “better leader.”

Finding 1 Summary: View of Themselves and Others

In this section, I shared how learning about adult development, ways of knowing and developmental diversity (Drago-Severson, 2004a, 2009, 2012a, 2016a) in the DILI led to a change in participants’ view of themselves and other adults. More specifically, they shifted their perspective as they increased their self-awareness (13/13), depersonalized developmental differences (5/13), and used the ways of knowing to differentiate their approach when communicating (7/13). While the examples I discussed above (e.g., broadly being aware of developmental diversity, changing the way they viewed the way adults learn, and adjusting their own methods of communication) reveal the many levels of perspective change that the participants said they experienced, I believe that – taken together – they highlight a new way the teacher leaders came to see themselves and others, and that this shift in perspective helped them to understand other people in new ways and communicate. As noted in Chapter II, Troen and Boles (2012) said, “Teachers become leaders in their schools by being respected by their peers, being continuous learners, being approachable, and using skills and influences to improve the educational practice of their peers” (p. 30).

In the next section I discuss the second perspective shift described by the participants – a shift in their perspective on collaboration.
Perspective Shift Finding 2: Shifting Collaboration from a Challenge to a Support

Using each other’s strengths and not their weaknesses was a big piece that I learned to build a better team. It's really helped our team grow. It was so powerful because we could rely on each other and not be on your own island. - Katie

All 13 participants described how they changed their perspective on collaboration. They said that previously, collaborating with others was “challenging” and this changed as they experienced “effective” collaboration with cohort members in the DILI. In addition, the participants (13/13) cited that the new tools they learned helped them to be able to facilitate collaboration with developmental intentionality. That is, they explicitly mentioned specific learnings from the DILI such as the ways of knowing and other tools they learned in the DILI that supported their new perspective on collaboration. Table 18 shows that all 13 of the DILI completers reported a new positive attitude about collaboration.

Table 18

<table>
<thead>
<tr>
<th>New Perspective About Collaboration</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>No longer frustrated with collaboration</td>
<td>10</td>
<td>Gabriella, Franny, Joan, Fatima, Rosa, Mary, Emma, Elizabeth, Katie, Edith.</td>
</tr>
<tr>
<td>DILI provided tools for productive collaboration</td>
<td>13</td>
<td>Gabriella, Franny, Angelica, Joan, Fatima, Rosa, Katie, Mary, Emma, Elizabeth, Cathy, Edith, Patricia.</td>
</tr>
<tr>
<td>Positive feelings about collaboration post-DILI</td>
<td>13</td>
<td>Gabriella, Franny, Angelica, Joan, Fatima, Rosa, Katie, Mary, Emma, Elizabeth, Cathy, Edith, Patricia.</td>
</tr>
</tbody>
</table>

The DILI completers spoke of how they shifted their perspective as they came to develop “tools” in the DILI that helped them appreciate collaboration in new ways. Ten of the participants (10/13) spoke of how they previously “dreaded” collaboration and found it to be “frustrating” or “upsetting.” None of the remaining three spoke positively of their previous
experiences with collaboration. All 13 participants (13/13) reported that they had learned “tools” in the DILI to support “productive” collaborative experiences for themselves and others. That is, they changed their view to describe collaboration as “easier” and “rewarding.” All 13 participants (13/13) also reported a shift in perspective as they developed positive feelings about collaboration through their experience in the DILI. They said that they newly “valued” and were “deeply satisfied” collaborating with others. Just as none of the participants spoke highly about their collaboration experiences before the DILI, none of them spoke about collaboration poorly after the DILI. In fact, they were clear that their new “tools” were integral to their shift in perspective, as they came to value the power of collaboration in their leadership practice as an effective way to learn, support students, and support other teachers.

Collaboration is important in education today, particularly for teacher leaders. As noted in Chapter II, collaboration has taken center stage in education, as it is explicitly drawn out in educational policies and instructional standards (Darling-Hammond & Richardson, 2009; Darling-Hammond et al., 2009; Darling-Hammond et al., 2017; DeMonte, 2013; Ronfeldt et al., 2015; Santos et al., 2012; Wagner et al., 2006). This emphasis on collaboration is a new demand necessary to meet the requirements of recent standards and a shifting population of students (Achieve, 2017; DeMonte, 2013; Drago-Severson & Blum-DeStefano, 2018d; Wilhoit, 2012). Thus, this school cultural shift presents a mixed challenge for educators as it changes the landscape of schools (Linsky & Lawrence, 2011; Wagner et al., 2006). Teachers are called to share expertise, strategies, and resources to meet these demands as collaboration has become the new normal in schools (Drago-Severson, 2004a, 2009, 2012a, 2016a).

In the following three subsections, I show how the participants spoke about their prior experiences with collaboration, their new successes with collaboration, and their perspective
shift on collaboration. I explain how Fatima and Rosa described collaboration as frustrating because they “didn’t know how” to collaborate. I then describe how the participants’ started to have positive experiences collaborating with others. I share how Cathy “matched tasks to a person’s way of knowing,” and how Joan “tailors requests to match a person’s way of knowing” as examples of the “tools” of adult development that all 13 participants described as the catalyst for their perspective shift and newfound value for the ways collaboration could support their work as teachers and leaders. In the third subsection, I explain how the participants’ felt that their “new tools” helped shift their perspective and gave them a newfound value for working with others. I chose Fatima, Rosa, Cathy, Joan, Katie, Edith, and Patricia as the most representative examples of all 13 participants to illuminate how the participants shifted their perspective from feeling “frustrated” with collaboration to having “more positive” experiences that led to a shift in perspective and a new way to enhance their practice as teacher leaders (10/13).

No Longer Frustrated with Collaboration

Ten of the participants (10/13) spoke of how they previously “dreaded” collaboration and found it to be “frustrating” or “upsetting.” Again, this topic was not in my interview protocols, rather it arose organically in the interviews for 10 of the participants – and none of the remaining three spoke positively of their previous experiences with collaboration. Below, I quote Fatima, Rosa, and Katie each of whom “didn’t know how” to collaborate, and therefore “avoided it” or felt like it was expected but they “never got much from it” to highlight the claim that collaboration was previously frustrating. Each of these three participants spoke of ideas that were typical of this group (10/13).

“And You’d Be Like, Oh God, Here We Go.”
Fatima, a teacher in her 50s with over two decades of teaching experience, compared collaborating with teachers on her team to the bad experiences she had as a student when working with others.

Before [the DILI], working on a team was something that was expected…You wanted everyone to do their share, but…it was more like being in high school and the teacher would say, “Okay, this is a team project.” And you’d be like, “Oh God, here we go,” and then do all the work. That’s kind of the reaction we used to get within our team. Learning how to make a team effective was not something that I never focused on much.

Fatima illustrated how for her, while working on a team was “expected,” she always felt like she would “do all the work.” And that her team did not react well when they had to work together. She compared it to group projects in high school to describe the frustration she experienced with collaboration prior to her experience in the DILI.

“I Wanted to Collaborate But I Didn’t Know How.”

Rosa (a teacher in her 50s with almost two decades of teaching experience) shared how as she was expected to collaborate more often, it was “a little difficult” at first because she “didn’t know how to.”

[When the district added additional teachers to our team,] it was a little difficult for me in the beginning. Not because I didn't want to [collaborate], but because I didn't know how to. I was so used to just doing it for myself.

Rosa described how adding teachers to her team and the need to collaborate was “very difficult” because she only knew how to do was work by herself. Like Fatima, Rosa found the expectation of collaborating with others to be “very difficult” especially because she never learned ways to collaborate.
“Using, Each Other’s Strengths were a Big, Piece that Built a Better Team.”

Katie, a teacher in her 40s with over two decades of teaching experience, explained that not being able to collaborate and share work with others took a toll on her work life balance and relationships with her colleagues before her experience in the DILI.

I always did all the work. I would close out with the custodian and I wanted everyone to do the same and put in all the effort. And then I felt like I did the work and everyone just kind of took it. And I would get upset about it. Back then, [I used to think] it could really be amazing if we all work together... But I didn't know how to achieve it.

Before participating in the DILI, Katie like Fatima felt as though “she did all the work,” and let others to “just kind of [take] it,” because she wanted everyone to work “the same” (i.e., work late like she did). While she wanted to share the workload with others, she explained that – like Rosa and the other eight DILI participants with negative prior experiences with collaboration – she simply did not know how to make that happen. This led to feelings of frustration when she needed to collaborate with others.

The participants’ shifted their perspective as they came to experience success with collaboration. I discuss this next.

Successfully Collaborated in their Schools

Thirteen of the participants (13/13) spoke of how their experience in the DILI provided them with a “model” and/or “tools” that helped them to collaborate in “different” and “successful” ways in their schools. As they transferred these learnings to their work in their respective schools (which I discuss more fully in Chapter VIII), they had positive experiences with collaboration, both as they learned in the DILI and as they worked with other colleagues. When asked about the learnings that were most supportive of developing teacher leadership practices and addressing challenges, the participants (13/13) spoke of how the “tools” for collaborating including the ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a), as
some of their most helpful learnings. Ten of the participants (10/13) said that these tools also helped them overcome a challenge with collaboration. Joan used her knowledge of the ways of knowing to “tailor” her approach, while Cathy was more “deliberate when delegating” based on someone’s way of knowing, and Edith “tried different approaches” so she could be more supportive. Below, I discuss Joan, Cathy, and Edith’s experiences each of whom spoke of ideas that were typical of these 10 participants.

“I am Better at Tailoring my Requests.”

Joan, a teacher in her 30s with almost a decade of teaching experience, described learning about developmental diversity as a “tool” that helped her to “tailor” her requests from her teammates. As she explained, “When I consider somebody's way of knowing, I am better at tailoring my requests.” Joan started to “tailor” things and considered the goodness of fit of a person’s way of knowing and the task at hand (Drago-Severson, 2004a, 2009, 2012a, 2016a). She found her new experience collaborating to be much more “effective” and “satisfying” because she could “really advocate for kids.”

“It Helps to be More Productive.”

Cathy, a teacher in her 50s with almost three decades of teaching experience, also described how she used the ways of knowing as a tool to support delegating work when collaborating with her team.

Sometimes when you are collaborating with people, it's knowing who you are working with. [I use] the different ways of knowing to figure out what [way of knowing] people are and to give them, a task that they might be able to accomplish.... And, that helps you as a team leader to be productive with those tasks.

Cathy transferred what she learned in the DILI about adult development and providing leadership roles to engage in more “productive” collaboration. By “productive,” she meant, that through her collaboration with others they were able to accomplish more work and better achieve
their goals. In other words, as Cathy used her knowledge of adult development, and then experienced *productive* collaboration. This helped her to shift her perspective and find value in collaborating with others.

*“It was Very Rewarding.”*

Edith, a teacher in her 30s with half a decade of teaching experience, said that learning that she came to recognize that “not everyone is the same” and learning to “approach people in different ways” made it “easier” for her to have conversations. She shared a story of how she supported a struggling teammate who had an emotional response to creating student growth objectives in a team meeting. Edith shared how she used her “tools” to try a different approach to be of most support to her colleague. She illustrated this with a story.

I was working with a teammate on student growth objectives. When I was first talking to her, I thought that she was very overwhelmed and getting emotional and I stepped back and I thought about her way of knowing and how to say the same thing, but in a different way. So, I decided to break it down for her, instead of just explaining everything all at once. It was very rewarding because she approached me and said, “Thank you so much for helping me to do this work. You really explained everything in a way that I could understand.” She even bought me a little gift card because she really was appreciative.

Similar to how Cathy considered her teammates’ way of knowing when assigning a task, Edith considered her teammate’s way of knowing to “say the same thing in a different way” when a teammate was “emotional” and not responding well to her first approach. This, in turn, produced a productive outcome. Edith emphasized how “rewarding” it was to have the tools to be able to effectively collaborate with a teammate, thus highlighting her own shift in perspective. As the participants transferred their knowledge of developmental diversity to their practice as teacher leaders, the positive response they received from their teammates led to “more successful” collaboration with others, and aided them in shifting their perspective to find value in collaboration.
A third way that participants shifted their perspective on collaboration was over time, they actually developed a new attitude towards collaboration.

**New Attitude Towards Collaboration**

The 13 DILI completers (13/13) described collaboration as a positive experience in their interviews. This was a marked shift from how they understood collaboration before participating in the DILI. As they shared their learnings, they specifically pointed to how they developed a new repertoire of skills for working with adults with different ways of knowing and that helped them to understand, experience, and facilitate meaningful collaboration. More specifically, all 13 of the participants (13/13) spoke of how they collaborated in “different” and “successful” ways in their schools. This was a change from how some participants previously “dreaded” collaboration and found it to be “frustrating” or “upsetting” (10/13). Participants shared how their new “tools” and this perspective shift supported their work – as teachers and as teacher leaders – as they began to collaborate in more meaningful ways. To support this claim, I highlight how Patricia noted that “education changed so drastically” and Rosa described how she came to realize that collaboration was vital to being able to “support each other and tackle changes together” while Fatima shared how this experience changed her perspective to recognize “the importance of collaborating” and she has come to “value collaboration much more.” I discuss experiences from Patricia, Fatima, and Rosa, since they each spoke of ideas that were typical of these 13 participants.

*“Education has Changed so Drastically.”*

Patricia, a teacher in her 30s with over a decade of teaching experience, succinctly summarized how her perspective shifted from collaboration not being “really important” to
recognizing that effective collaboration was key to handling the demands of teaching and leading.

Based on what some of us knew in education 10, 15, 20 years ago, education has changed so drastically. A lot of the things that I've learned [in the DILI] can only better help us support each other and get through some of these changes and tackle them together, rather than becoming very overwhelmed and stressed and feeling like we're always floundering. [Learnings from the DILI] really…helps us as adults work together in a field and climate that has very much changed for many of us. And, it really just taught me the importance of finding ways to really work together.

Patricia shared that she learned a set of skills in the DILI that allowed for “better support of each other,” including the ability to “get through changes and tackle them together” – as opposed to “feeling like I’m always floundering.” Patricia’s thinking captures the increased challenges for educators that researchers describe as so notable (Drago-Severson, 2004a, 2009, 2012a, 2016a; Linsky & Lawrence, 2011; Wagner et al., 2006). For Patricia, collaboration and working with other teachers has become important to collectively managing the challenges she faces in her teaching and has changed her perspective.

Similarly Rosa, a teacher in her 50s with almost two decades of experience, described the challenges and changes in education, and also said that increased collaboration helped her to overcome the challenges of “differentiating, new standards, new curriculums, and meeting her students’ social and emotional needs.” She too changed her perspective and came to value collaboration after she overcame the challenge of not “knowing how” to collaborate.

It's been very different from then [before the DILI] to now. We collaborate a lot more now, and I think a lot of it had to do with learning about the importance of it and being able to bring it to the team. When we utilized each other’s strengths to share the work load, everyone felt really satisfied like, “Wow, we're making good progress here.” It brought up the whole team morale. Having the tools to help to make a stronger team is what's important.
For Rosa, “the tools” she learned in the DILI (e.g., such as learning about the ways of knowing, norms, team surveys, agendas, and celebrations) helped her to experience and value meaningful collaboration as she saw benefits such as “sharing the work” and bringing up “team morale.”

“I Did Not Recognize the Value of Collaboration as Much as Now.”

Similarly, Fatima described how she did not “value” collaboration until she experienced productive collaboration in the DILI. This included learning teaming protocols and the ways of knowing which shifted her perspective and, in turn, shifted her actions. Fatima shared a story of how she transferred her learnings and facilitated effective collaboration with her team.

After going through the [DILI], it allowed me to recognize that collaboration can go beyond discussing lesson plans. It could allow myself and others to grow. I found myself, applying developmental strategies to how I interacted with teammates. Now I recognize the fact that everyone has strengths and talent and together we can make things so much better. Now for the first time, when we planned our lessons, we really collaborated and we’d all contribute. [For example,] the other teacher would come up with PowerPoint presentations for how she thought we should do the plans. I would do the visuals and charts. It was, the first time that as a team, we really worked together.

Fatima shifted her perspective and saw collaboration as much more than just accomplishing a discrete task. It had become a way to “allow myself and others to grow.” She “applied developmental strategies” (i.e., the ways of knowing, teaming protocols, and celebrations) to her collaborative practices and “for the first time as a team, we really worked together.” For Fatima this shifted her perspective as she came to value collaboration as a way to not only get things done but to also support the development in others.

Perspective Shift Finding 2 Summary: Collaboration

I learned from the 13 DILI completers that they shifted their perspective from not valuing collaborating with peers to, as Fatima said, “finding value in the opportunity to learn from one another.” This represents an important shift in their perspective, since they previously preferred to work independently. More specifically, the 13 teacher leaders shared that – as a result of
learning about developmental diversity, developmentally intentional protocols, and practices to support collaboration (i.e. the ways of knowing, setting norms, having agendas, team surveys, check ins, and celebrations) – they had a new repertoire of tools to use to support productive collaboration and the work of teaching and leading. The stories of Fatima, Rosa, and Katie offered the most comprehensive examples of how participants experienced collaboration as “frustrating”—before learning in the DILI. Joan, Cathy and Edith described successful experiences with collaboration that were echoed by all 13 (13/13) DILI completers. Patricia, Rosa, and Fatima typified how all 13 (13/13) spoke emphatically about shifting this perspective to finding collaboration to be valuable in meeting the demands of teaching today and supporting others in their work as teacher leaders. I shared four participants before-and-after stories of their perspective shift on collaboration.

- Patricia shared how previously collaboration was “not important” and now she saw collaboration as a way not to be overwhelmed and manage the demands of education.
- Rosa recognized that collaboration was hard without “knowing how to collaborate” but then shifted to see that the tools made it “productive” and “uplifting.”
- Katie didn’t need to do the work by herself and no longer felt like “an island” as she moved to working with others and “dividing the workload.”
- Fatima no longer thought of collaboration as a high school group project and found value in using collaboration as a way to “support the development of others.”

Educational researchers and practitioners continue to compare U.S. teachers’ minimal amount of time to collaborate with the far greater time for collaboration provided to teachers in the world’s highest-performing countries (Berg et al., 2019). The participants’ in this study revealed that by “learning the tools,” as Mary put it, for collaboration it helped them find
meaning in working with others, leading them to collaborate to a greater degree than before their DILI training.

I close my discussion of how the DILI completers described the ways in which their perspective changed regarding collaboration by briefly comparing their experiences with the three teachers who did not complete the DILI.

**DILI Non-Completers**

The three non-completers participated in just one or two years of the three-year DILI. Therefore, they did not have the same training as the completers. This is important because throughout the interviews, all of the DILI completers (13/13) shared that both the curriculum and the sustained three years of the program served as an important support for their teacher leadership. The non-completers did not have as much exposure to the DILI curriculum or the time in the cohort that the DILI completers described as “important” and helpful to their development as teacher leaders.

Not surprisingly, the three non-completers did not report the same change in their perspective(s) as the completers did. In fact, only one of the three non-completers reported a change in perspective in their interviews – as compared to all (13/13) of the completers. I believe this happened – or did not happen – because they did not participate in the full DILI program and therefore did not receive the same amount of training as the completers. As mentioned earlier, I did not ask about participants about “perspective shifts.” Rather, I asked “what, if anything, did you learn that was most helpful?” Participants volunteered these ideas about perspective shifts. That is, perspective shifts were not the direct topic of an interview question, and instead arose from the participants’ words (Saldaña, 2016) as participants volunteered it, themselves. Table 19 shows the DILI non-completers’ shifts in their perspectives.
Table 19

*Perspective Shifts for the Non-Completers*

<table>
<thead>
<tr>
<th>Perspective Shift</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>No shift</td>
<td>2</td>
<td>Anne, Samantha</td>
</tr>
<tr>
<td>Accepting of learning from other adults</td>
<td>1</td>
<td>Natale</td>
</tr>
</tbody>
</table>

As can be seen in Table 19, two of the non-completers did not say anything about shifts in their perspectives. Anne, a teacher in her 40s with over two decades of teaching experience, and Samantha, a teacher in her 50s with two decades of experience, both spoke about their experience learning about developmental diversity and ways of knowing, as “helpful.” However, unlike the 13 DILI completers – they did not talk about shifts in in their perspective. Samantha explained that she found learning about herself and others was “helpful” and that she “became more self-aware of the effect of [her] comments on others and started to take that into consideration.” These two non-completers appreciated the opportunity to learn about developmental diversity but throughout their interviews they did not connect it to a shift in their perspective.

“*This Person Here was Sent to Me by a Gift from God.*”

Only Natale, a teacher in her 50s with almost two decades of teaching experience, spoke to her experience in the DILI as leading to a perspective change. Natale shared a story about how her perspective shifted as she realized she could learn from her peers when “she let others in.” Unlike the DILI completers Natale did not link her perspective shift to learning about the ways of knowing but rather she credited the time to “reflect” and “discuss with others” in the DILI as being most helpful for her. Natale acknowledged that previously she did not want anyone else “in her classroom” and she wanted to be the “sole person in charge.” However, she reported that
as she learned and reflected in the DILI, she simultaneously came to shift her perspective and became willing to learn from her co-teacher. She finally described the lessons her co-teacher taught her to be “the best gift for me.”

When I realized that I was [going to] have a co-teacher at first, I was put off by it. Because I’m in charge of this room. Why should another adult be here? During the reflection time we did during the cohort, I realized that this person here was sent to me by a gift of God. It turns out having her in my room was probably the best gift for me because when I would be very judgmental about a student and say, “I don't get it. I showed this kid three different ways to do the skill. Why aren't they getting it?” She would say, “You have to keep in mind they don't see things the way that you and I [do]” and she would put everything in perspective for me. She really allowed me to understand how I should be respectfully dealing with students and not judge them.

In her own reporting, Natale shifted her perspective as she engaged in reflective practices in the DILI. She “let her [co-teacher] in” and learned to understand her students better, illustrating exactly how her new perspective on collaboration made her a better teacher. Though she did not link this shift specifically to understanding ways of knowing, she did relate it to the context of her learning in the DILI. She concluded by describing this perspective change and the lessons she learned from her co-teacher as a “gift from God.”

All three non-completers reported that learning about developmental diversity was “helpful” but they did not tie it to a direct shift in the participants’ perspectives about working with other adults. That is, none of the non-completers said that they had a shift in perspective as a result of learning about ways of knowing, nor that it was applicable to their work with other adults. Only Natale described coming to find value in collaboration which she connected to the reflective practices in the DILI. Repeatedly throughout their interviews, the other participants – including both the DILI completers and administrators – spoke of the importance of the sustained experience in as a three-year institute (i.e., the third element of a holding environment) that helped them to experience deeper learning and take greater risks each year. While I cannot know
what the experience of the non-completers might have been, had they completed the three-year institute, I wonder if additional time to learn and take risks in a holding environment would have made a difference for the three participants who did not complete the DILI.

In the next section, I discuss a third shift in perspective. I discovered that the majority of the DILI completing teacher leaders’ (10/13) perspectives on how they defined leadership and viewed themselves as leaders changed.

**Perspective Shift 3: Reconceiving Leadership**

In this section, I explore the third perspective shift that the DILI completers reported. Ten participants (10/13) expressed that they shifted the way they conceived leadership through their experiences in the DILI. As they learned about adult development and Learning-Oriented Leadership (Drago-Severson, 2004a, 2009a, 2012a, 2016a) they explained that they came to see leadership as a responsibility to develop and support others. These teacher leaders each reported previously held conceptions of teacher leadership.

- A formal organization position (5/13).
- A persona of perfectionism that could not model vulnerability (6/13).

All ten, however, shifted their perspectives to see leadership as being exerted by anyone who supports and develops others. Half of them (5/10) said that they used to see leadership in a different way. Elizabeth described leadership as a “formal title,” particularly in the role of the “principal” (5/13). The other five participants and Fatima, who was in both groups, used to see leadership—in Fatima’s words—as a state of “perfection,” “having all the answers,” and “not being allowed to show any vulnerability” (6/13). Those who spoke about this shift did not do so in response to a particular question, rather it arose organically at different points in their
interviews. The other three DILI completers did not discuss how they defined leadership, either in the past or more recently. The 10 participants who did describe the ways their perspective shifted as they redefined leadership spoke about a revised definition that newly defined leadership. Katie newly defined leadership as “helping” and “supporting.” Donna defined it as “growing.” All 10 said that shifting the way they defined leadership had helped them to see themselves as leaders. In Table 20 I summarize these shifts.

Table 20

<table>
<thead>
<tr>
<th>Old Conception of Leadership</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>A formal title</td>
<td>5</td>
<td>Katie, Fatima, Gabriella, Elizabeth, Patricia</td>
</tr>
<tr>
<td>Not being vulnerable</td>
<td>6</td>
<td>Fatima, Cathy, Rosa, Franny, Mary, Gabriella</td>
</tr>
</tbody>
</table>

Of the 10 participants, only Fatima, a teacher in her 50s with over two decades of experience, spoke of previously holding on to both conceptions before her shift in perspective. While she mostly spoke about how she had identified leadership as a formal title, she also spoke about how she previously thought leaders did not show vulnerability and therefore uniquely bridged both categories. Fatima captured the essence of all 10 participants’ new conception of leadership.

I thought that leadership involves a formal title where I needed to be a principal. But leadership is…beyond the title. Everyone has the capacity to be a leader. Leadership is helping others grow. Being a leader doesn't mean that I have to be perfect in every action. I recognize that it's okay to be vulnerable.

Fatima and the majority of the DILI completers shifted their perspective to see leadership as “helping others grow,” which in turn helped them to “see themselves as leaders.” As they saw
themselves as leaders they came to assume acts of leadership—by this I mean that they took on new and additional responsibility in support of others.

In this section I share how Katie, a teacher in her 40s with over 20 years of teaching experience, described how she changed her definition of leadership. Prior to the DILI she used to define a leader as someone who was “in charge.” Overtime however, she shifted her perspective to define leadership as “helping others.” Elizabeth and Gabriella also shifted the way they defined leadership. Elizabeth and Gabriella both accepted the “vulnerability” associated with leadership and Fatima came to see leadership as neither being “perfect” nor a “formal title” but as “helping others grow.” Gabriella forced herself to be “open to the idea of being a leader.” Elizabeth no longer “hid and avoided” a leadership role. Katie, Fatima Gabriella, and Elizabeth represent the varying way the participants’ described shifting their definition of leadership.

“It’s More Satisfying When You Can Help Others Grow.”

Katie explained that for her, “leadership was being in charge.” This view was expressed by four other DILI completers, as well (5/13). For instance, Katie wanted to be seen as a leader, but found that others were not always “receptive” to her taking “charge.” She described how she shifted her perspective and in turn, others shifted their response.

I always thought of leadership as being, just stand and deliver professional development. You deliver it and they do it. And if you think of them as adults, you think they can learn anything and they can do whatever you said. But in our classrooms, we treat each student as an individual and we should do that with adults. I think that truly helped me, because my colleagues saw me as someone they could go to and I could always have the answer for them, but I don't feel like I was helping them grow.... My role has transformed. Teachers trust me and ask, “Can I come into your classroom and learn from you and see how you're doing this?” I learned it's more satisfying when you help others grow.

Katie shifted her perspective and definition of leadership as she realized leadership was not about standing in front of people and delivering information and commands, but rather it was about “help[ing] others grow,” particularly her fellow professional educators. As she described her new
conception of leadership, she explained that this shift in her perspective helped her to transform her leadership practice. She began to assume greater leadership responsibilities (e.g., hosting interclass visitations and leading professional development differently). This shift in thinking about leadership is an explicit theme in Drago-Severson’s (2004a, 2009, 2012a, 2016a) *Learning-Oriented Leadership.*

Like Katie, Fatima shared how her new perspective informed her work as a teacher leader. I discuss her experience next.

**“Leadership Means Building Up Someone’s Capacity in Whatever Role I’m In.”**

Recall that before her experience in the DILI, Fatima had considered leadership to be both a formal role and a persona of perfection without signs of vulnerability. However, her view entirely shifted.

Everyone has the capacity to be a leader and I quite honestly did not think of it that way…. But now, [the DILI] has taught me that it really is something special to recognize people, and make people feel more comfortable. To build up their leadership capacity is a vital part of, whatever role I'm in… [I realize that] when you trust others, and help others grow, you can succeed. That's something I never would have done before.

Fatima saw that instead of seeing leadership as a formal role, she came to see that “everyone has the capacity to be a leader.” This perspective shift has informed Fatima’s practice as a teacher leader as she started to “recognize people,” make them feel “more comfortable” and “build up their leadership capacity.” This illustrates how Fatima came to accept herself as a leader.

As Katie and Fatima let go of the notion of leadership as a formal role, they looked for ways to support the development of *others.* Katie said that one way she did this was to host interclass visitations. Fatima spoke of intentional efforts to build up the leadership capacity of others. This experience resonates with Gabriella’s experience and the second way that the DILI
completers shifted their view of leadership as they came to see that leaders were not just those with a formal title but instead anyone who supports others.

“It was Okay if I Don’t Have All The Answers.”

Six of the teacher leaders (6/13) shared that they shifted their perspective and leadership philosophy from a persona of perfection to a more vulnerable kind of leadership. For them, this included “not having all of the answers,” “not needing to be perfect,” and “taking risks” alongside one another. This was important as the DILI completers transferred their learnings from the DILI and began to “enter into the arena” of leadership (Brown, 2012, 2018) as they assumed greater responsibility and sought to support others’ development.

Gabriella, a teacher in her 50s with two decades of teaching experience, explained how shifting her perspective on leadership to include vulnerability “was one of the best things” that came from her time in the DILI.

I’ve always sort of played an unofficial leadership role and was never comfortable with it. I hated faculty meetings where the administration would ask, “What do you think of this?” And I would know what I wanted to say, but I found myself, couching around it or, saying, “I’m not sure.” But I knew-damn right! what was the best research was, because I do research all the time and I’m always looking for better ideas. Then I [realized]...I was afraid of other people’s perceptions of me. I knew consciously that I needed to be more comfortable with the idea of being a leader. I felt like, “Come on girl, you’ve been avoiding this for years,” and I realized it’s okay if I don’t have all the answers. I don’t have to be responsible for everybody. The best way that I can create change is to not be in charge but to mentor so that we can lead together. I’m more conscious of, the ways people learn. And, being a leader, you have to acknowledge some vulnerability as well. [Being able to be vulnerable] was one of the best things to come from [leadership].

Before participating in the DILI Gabriella – like Fatima – saw leadership as “being in charge” and “was never comfortable” with everyone looking to her in that way. Even sharing her opinion at faculty meetings was “uncomfortable,” despite the fact that she was quite confident in her knowledge. Having shifted her perspective, Gabriella also shifted her actions. She ended up
assuming greater leadership responsibilities, as she “mentored other teachers so they could lead together.”

Like Gabriella, Elizabeth also learned that leadership was about vulnerability.

“Before I Would’ve Hid. [Now] I’ve Become a Leader.”

Elizabeth, a teacher in her 40s with two decades of teaching experience, shared that previously she “would’ve avoided a leadership role at all costs.” She wanted to stay “under the radar.” Once she shifted her perspective on leadership to include vulnerability – which she described as “being open” – she was able to see herself as a leader.

Before I would've hid. I would've avoided [a leadership role] at all costs. Now, even though it's not completely in my comfort zone, I'm willing to try. I've been able to give professional development, I've been able to help my colleagues more, because now they come to me for help because I've been more open, whereas prior to this, I, wasn't very open and there's a trust between my colleagues and myself [now]…. And, I’ve become a leader.

For Elizabeth, shifting her conceptions of leadership to center around “helping colleagues” helped her to be more “open” and “willing to try.” Like so many other DILI completers, this shift in perspective lead to a shift in Elizabeth’s behavior. After participating in the DILI, she described how she “helps colleagues more” and has “led professional development.” Elizabeth and the other participants’ experiences illuminated how this shift in perspective was an important segue to their assuming greater responsibility and engaging in more acts of leadership (e.g., leading professional development sessions, introducing teaming protocols). Shifting their perspective and the ways they view adults and leadership was connected to and necessary for the teachers to assume acts of leadership. I will fully discuss leadership roles in Chapter VIII.
Perspective Shift Finding 3 Summary: Reconceiving of Leadership

Ten of the DILI completers described how they shifted their perspective to redefine leadership (10/13) for themselves. Fatima, Katie, Gabriella, and Elizabeth’s examples illuminate how they changed their conception of leadership in two ways:

- Six participants moved away from believing a formal title or role was required in order to be a leader.
- Five participants moved away from believing leaders could not show vulnerability.

All 10 participants came to recognize that leadership is, as Fatima (who was in both groups) said, “supporting others’ growth.” This shift in perspective was important because all 10 of these participants described how it was the catalyst to their development as teacher leaders, and they became willing to assume actions of leadership to support others.

For these 10 participants, shifting their definition of leadership to center around caring for the developmental needs of others was an important factor in transferring their learnings from the DILI to their practice as teacher leaders and assuming greater leadership. In Chapter VIII, I discuss this transfer to their leadership practice in their schools in more detail.

Chapter Summary

In this chapter, I discussed my three findings about the perspective shifts that the DILI completers attributed to their participation in the DILI. First, participants described how learning about developmental diversity and the ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a) shifted and broadened the way they viewed other adults and also increased self-awareness (13/13), enabled them to depersonalize developmental differences (5/13), and helped them to adjust their communication in order to better meet developmental needs of others (7/13).
Second, the teacher leaders described shifting their perspective to value collaboration (13/13). By learning “tools” for communication and collaboration, they were better able to engage in meaningful collaborative work (13/13) and could support the development of others (7/13). Third, most (10/13) of the teacher leaders reformed their ideas about leadership from formal titles/responsibilities (5/13) or personas of perfection (6/13) without visible vulnerabilities to a new definition of “supporting others” in a way that was less associated with a “formal title” and filled with “vulnerability.”

The DILI completers (13/13) directly connected their changes in perspective to their learning about Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) and their participation in the DILI. More specifically, their shifts in perspective informed the way they viewed themselves, other adults, collaboration, and leadership. And, it set the foundation for their leadership development. Learning about adult development, developmental diversity, and the ways of knowing through Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) shifted their perspective, and set the foundation for the findings I discuss in Chapter VIII (i.e., about how the 13 completers transferred their learning to their schools by assuming acts of leadership).
CHAPTER VIII: TRANSFER FINDINGS AND ACTS OF TEACHER LEADERSHIP

_The way to the students is through the teachers._ -Christy Joswick-O’Connor

In this chapter, I discuss three findings that show how the DILI completers transferred, or carried their learning from the DILI into their practices as teacher leaders. This cluster of findings arose as I explored my first and fourth research question. My first research question asked: *How do 13 teacher leaders who took part in a developmentally intentional leadership institute (DILI) describe and understand the leadership responsibilities they assumed, if any? What challenges, if any, do they report facing as they developed their leadership practice?* My fourth research question asked: *How do six school administrators describe and understand the influence of the three-year DILI on the formal and informal leadership practices of the teacher participants?*

In their interviews all 13 of the DILI-completing participants (13/13) described at least one type of transfer—a way in which they transferred learnings or practices from the DILI to their practice as teacher leaders. The shifts in perspective that I discussed in Chapter VII (e.g., seeing themselves as leaders, understanding developmental diversity, coming to value collaboration) appear to have been important to them being able to transfer ideas, thinking, and learnings to their practice as teacher leaders. More specifically:

- Participants assumed formal leadership responsibilities (13/13).
- Participants felt more empowered (13/13).
- Participants reported feeling less stress, even as they took on greater responsibilities (10/13).
Throughout this chapter I also discuss how the six administrators who completed the DILI described the varied ways in which the teachers’ actions of teacher leadership positively influenced the school district. I do not discuss the DILI non-completers, as none of them (0/3) reported assuming any acts of leadership.

In the first finding section I describe the acts of teacher leadership reported by the DILI completers. All DILI completers (13/13) assumed greater leadership responsibilities as they transferred their learnings from the DILI to their practice as teacher leaders. More specifically, I explain that the teachers assumed particular leadership responsibilities during and after the DILI.

- Leading professional development (12/13).
- Assuming formal mentoring roles for others (7/13).
- Informally supporting others (5/13).
- Introducing developmentally intentional teaming protocols (13/13).

I also discuss the administrators’ perspectives on this.

Next, I describe my second transfer finding: all of the DILI completers (13/13) reported greater feelings of empowerment. They described this in three main ways.

- Participants reported feeling more confident (11/13).
- Participants reported feeling valued (9/13).
- Participants reported finding their voice and speaking up in new ways (10/13).

Again, I explore the administrators’ views of the phenomenon that the teachers described.

In the last section I explain my third transfer finding. The majority of the DILI completers reported feeling less stressed as they transferred their learnings from the DILI to help them manage the requirements of teaching and leadership (10/13). The teacher leaders shared
that their newfound abilities allowed them to (a) collaborate and divide their work, (b) say no, and (c) better manage their workload and challenges, all of which contributed to reduced stress.

In this chapter I highlight my findings that 100% of the participants transferred their learnings from the DILI and assumed greater responsibility by engaging in acts of teacher leadership. In doing so, the teacher leaders’ developed what I term positive internal outcomes as they described themselves as being more empowered, having found their voice, and reported reduced their stress. The teacher leaders’ acts of leadership and participation in the DILI positively influenced the school, district, and the teachers themselves, according to both the teachers and the administrators.

Transfer Finding 1: Assuming New Leadership Roles and Taking on Greater Responsibility

In this section, I describe how the DILI-completing teacher leaders transferred their learnings from the DILI and took on leadership roles. In this dissertation, I define a leadership role as taking on new responsibilities. These acts of leadership included leading professional development for their peers (11/13), mentoring others (7/13), assuming informal acts of leadership (5/13), and introducing developmentally intentional teaming protocols (13/13). By informal acts of leadership, I mean the ways that participants intentionally attempted to build trust and be accessible to support others. In Table 22 I list the four kind of leadership roles that the teachers assumed.
Table 22

Assuming Leadership Roles

<table>
<thead>
<tr>
<th>Leadership Role</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher-Led Professional Development</td>
<td>11</td>
<td>Gabriella, Franny, Fatima, Rosa, Katie, Emma, Mary, Elizabeth, Cathy, Edith, Patricia</td>
</tr>
<tr>
<td>Mentoring</td>
<td>7</td>
<td>Fatima, Rosa, Angelica, Katie, Gabriella, Mary, Cathy</td>
</tr>
<tr>
<td>Informal Check-Ins</td>
<td>5</td>
<td>Elizabeth, Katie, Mary, Edith, Rosa</td>
</tr>
<tr>
<td>Introducing Teaming Protocols</td>
<td>13</td>
<td>Emma, Angelica, Elizabeth, Mary, Fatima, Edith, Franny, Joan, Cathy, Katie, Gabriella, Ro, Patricia</td>
</tr>
</tbody>
</table>

Table 22 shows not just that all of the DILI completers assumed new leadership responsibilities, but also that almost all of the completers (12/13) took on more than one leadership role.

Leading Professional Development

In order to fully understand how the teacher-led professional development came about, I briefly review the DILI curriculum that was introduced in Chapter II.

The third year of the DILI curriculum was focused the Drago-Severson’s (2004a, 2009, 2012a, 2016a) fourth pillar practice of Learning-Oriented Leadership, *assuming leadership roles*, which considers goodness of fit when offering opportunities to take on new responsibilities. To honor the developmental needs of every teacher leader (or each person’s way of knowing and comfortability with a leadership role), each teacher leader was not assigned a leadership role but given the option to choose their own. More specifically, they were asked to consider a topic that they were personally interested in and passionate about, and to choose how *they* would like to “lead” that initiative for their team, their school, or the district. One suggested option was that they could elect to facilitate professional development with a partner or independently.
Eleven of the participants (11/13) chose to lead professional development for their peers. Their topics included Co-Teaching in Special Education, Teaching Vowels, Social Emotional Learning, and Mindfulness for Teachers. Seven teachers co-presented with a partner.

Additionally, seven of these 11 teachers extended their projects beyond the requirements of the DILI (i.e., a single-day professional development program). Instead these seven participants extended their projects in one of two ways. Five (5/13) elected to offer a *multiple*-day programs, and two (2/13) wrote companion curriculum on their topics. Two teachers from the DILI (2/13) chose to assume leadership by introducing a student initiative, rather than leading professional development. Their contributions to the students and their schools were important to the MELC School District, but discussing them falls outside the scope of this dissertation.

**Teacher-Led Professional Development: From “Out of My Comfort Zone” to “Worth It.”**

Ten of the 11 participants who assumed greater leadership responsibility by leading professional development, said that facilitating professional development for their peers presented important challenges for them to overcome. However, the participants also said that the support of the DILI (i.e., training on how to facilitate professional development, time to plan, resources, choice, and a partner) enabled them to overcome the barriers they faced. In fact, they explained that leading professional development for their peers provided them with a newfound source of confidence and satisfaction.

All 11 participants reported relying on multiple learnings from the DILI. Below, I explain how Franny, described her experience as changing from “out of my comfort zone” to finding “joy” and satisfaction. I also share how Gabriella was asked “more times than [she] could count to lead professional development,” and described how she had to let go of her worries about “what others would think” to be able to do finally do so. Franny and Gabriella were most
representative of the way the 11 teachers typically described how they assumed more leadership by leading professional development, and how in order to do so they had to overcome considerable personal challenges. I then discuss Katie, an outlier in the data—so to speak, because she was the only participant who described a different approach to facilitating professional development.

“I Went Out of My Comfort Zone.”

Franny, a teacher in her 50s with almost two decades of teaching experience, described how, at first, the idea of presenting professional development to her peers was uncomfortable—especially because she anticipated resistance from them.

I went out of my comfort zone and I… felt strongly about this initiative and I had the ability to be a leader with regard to this. But I knew introducing it would be faced with resistance from some of my colleagues whom I was presenting to. I reminded myself that [my students] learned from this, and it works so well. And I went back to the idea of understanding where their resistance came from and why they may be resistant. I [also] had the support of a partner from [the DILI] and we presented together. So that helped to boost my confidence and, [in the end] I enjoyed presenting and, doing professional development for other teachers.

Franny described how she assumed a new leadership role and in doing so, she faced resistance from peers who did not want to try a new approach. She found support in reminding herself that what she was teaching was good for the kids, and from working with a partner from the DILI. She also used her newfound perspective to see their resistance as something that could be developmental to help her depersonalize and “understand where their resistance came from.”

Thus, Franny transferred multiple learnings from the DILI to support her effort to lead professional development.

“I was No Longer Avoiding that Role of Being a Leader.”
Gabriella, a teacher in her 50s with almost three decades of teaching experience, shared how facilitating professional learning for her colleagues represented a new comfort level with her role as a teacher leader.

I have been asked more times than I can count to do some sort of professional development for teachers, and I never felt completely comfortable with it. This time, I don't know if it was because it was a self-selected topic, or if it was because I was no longer avoiding that role of being a leader – or maybe it was a combination of both. I was excited about it. I was excited about planning. I was excited about, putting these teachers together with me and meeting. And it was fun. I realized, that part of my discomfort with leading professional development in the past [was] knowing that some of them weren't going to hear what I was saying and not knowing what to do about it. And being uncomfortable with the idea that not everybody would like it. Not that they wouldn't be able to use the information, but that they wouldn't like it.

Similarly, to Franny, Gabriella was confident in the material she wanted to present. Her discomfort came from presenting to her peers, saying repeatedly that she was “uncomfortable with the idea that not everybody would like it.” This new leadership role required Gabriella to not only see herself as a leader but to also overcome her discomfort with taking a stance and “worrying” that others would not “like it.”

“Everyone was Much More Receptive.”

Katie, a teacher in her 40s with over two decades of teaching experience, was the only DILI completer (1/13) who had had facilitated professional development previously. She described a difference in the way she newly presented professional development to her peers after participating in the DILI.

In the past, I just threw it at them and called it “professional development.” [Now,] it's about understanding where everyone is developmentally, and that made a tremendous impact on the delivery and response. Everyone was much more receptive. It was much more rewarding.
Katie described how she utilized her knowledge of adult development to individualize professional learning and she noticed the teachers were “more receptive” than in her previous professional development sessions. This in turn made the experience more “rewarding” for her.

Next, I share the administrators’ stories of the teacher’s facilitation of professional development.

**From the Lens of the Administrator: Teacher-Led Professional Development.** The DILI completers (10/13) said that leading professional development – which was a new endeavor for the MELC School District – was challenging for them. The administrators also noticed this and said that overcoming these challenges was an important contribution to the participants’ development as teacher leaders. All of the administrators (6/6) described how the DILI completers acts of leadership influenced other teachers across the district. To illuminate this claim, I explain how Suzanne, a building principal in her 40s with over two decades of experience, observed her teachers overcome their fears and were able to “rise to the challenge of leading professional development” in a way that empowered them and the rest of the staff. I also share how Nicholas, a building principal in his 40s with over two decades of experience, observed one of the teacher leaders become “more professional” as she held herself and her peers more accountable. Last, I highlight Elmer, a district administrator in his 50s, who described how the teachers led professional development and provided a “platform to show their dedication.” I chose Suzanne, Nicholas, and Elmer as the most representative participants to illustrate how the other administrators described the ways in which the teachers assumed greater responsibility as they led professional development.
“It Definitely Empowered the Staff.”

Suzanne notice that the DILI completers rose to the occasion of leading professional development.

They were all pretty nervous about taking that challenge [of teacher-led professional development] on, but I think they did a great job and it was very well received. I think that was definitely something that empowered the staff to see, “wow, this is one of my colleagues that I work with that is teaching me and they really put a lot of effort into it.”

Suzanne saw that these emerging teacher leaders were “nervous” but ultimately did a “great job.” She described how the DILI completers overcame their fears and in doing so, they also “empowered the staff.” Suzanne continued by noting how the notion of teachers leading professional development began to “spread,” as one particular teacher leader sought additional opportunities to provide professional development to her staff. She recalled, “I gave her some faculty meeting time to be able to share out with the staff members. And I think she really was excited and really wanted to help.” Suzanne noticed that the teachers shifted from feeling “nervous” to feeling more comfortable assuming leadership.

“When they Presented, You Saw all the Norms Being Followed by the Staff.”

Nicholas described how he noticed one of the DILI participants transform her own behavior and become more “professional” after facilitating professional development herself. He compared that teacher’s professionalism before and after the DILI:

She would have sat in the back of the room, she would have texted, or graded papers, anything to not be involved. Instead, now she’s in the front of the room and pushing these teachers to do better, she makes sure she reprimands them if they're not doing what they’re supposed to be doing. She is definitely a different person.

Nicholas went on, explaining how this shifted the culture of professional development sessions.

When they presented, you saw all the norms being followed by all the staff more than if another administrator was presenting. I think it was great for the person that presented because I don't think they realized how much work and pressure is on them while presenting. But from the opposite side, seeing the staff engaged, whether they wanted to
be because they respect the staff member or because they were truly interested in what was taking place, was very nice to see.

Friedman (2011) has noted exactly this, that teacher leaders maintain high standards and serve as role models. Nicholas noticed that the teacher-led professional development supported teacher learning and elevated standards of professionalism.

“[It] Provided a Platform for Them to Really Show Their Colleagues How Committed They are to the Profession.” Similarly, Elmer, a district level administrator in his fifties with almost three decades of experience, noted that he did not think the teachers could have led professional development without their DILI experiences.

I think that the leadership cohort has provided a platform for them to really show their colleagues how committed they are to the profession and the depth of knowledge that they have, and their comfortability to, share it with their colleagues. And, I don't think they would have been comfortable had they not gone through the three years of the cohort.

Elmer identified a key point. The teachers repeatedly shared that they had always felt confident in their knowledge, but that they needed the DILI to feel “comfortable presenting to their peers.” Elmer concluded noting that the teacher led professional development was, “a great thing to see culturally, professionally.”

These administrators discussed how the teachers in the DILI grew to be able to assume greater responsibilities and assume leadership roles such as leading professional development. They also noted that, from their view, this resulted in gains in professionalism that benefited the teacher leaders themselves, and the district as a whole.

Teacher-Led Professional Development Summary

Over three-quarters of the DILI completers (11/13) transferred their learnings from the DILI to their schools by assuming the formal leadership responsibility of leading professional development for their colleagues. Facilitating teacher-led professional development is extremely
difficult as it requires a shift in cultural norms (Calvert, 2016), particularly in schools/districts where it has never really been done. System leaders are called upon to tap into the talent of their teachers to lead professional development for their peers as a way to create collaborative communities and improve teacher practice (Matherson & Windle, 2017).

Ten participants (10/13) shared that they were “uncomfortable” and “nervous” to assume this new kind of leadership responsibility, even though they felt “confident with the content.” This sentiment was described by Elizabeth who like 9 other participants, shared that she had to overcome her fears in order to be able to “share what [she] loved with [her] colleagues.” Franny, and Gabriella described how they relied on multiple learnings from the DILI – including a deeper understanding of adult development and developmental diversity – to assist them in stepping out of their comfort zone to be able to lead professional development. The administrators emphasized the teachers who led professional development were more empowered and that it had a positive influence on the culture of the district.

In addition to leading professional development, the DILI completers also became more active in their mentorship of others. I discuss mentoring, as a second example of the formal leadership roles—and another developmentally intentional pillar practice (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a) that they learned about in the DILI—in the next section.

Mentoring

A majority of the DILI completers (7/13) took on mentoring roles, the second type of leadership responsibility assumed by members of this teacher leadership cohort. The DILI curriculum was based on Drago-Severson’s model of Learning-Oriented Leadership and mentoring was one of the pillar practices that the participants learned about (Drago-Severson, 2004a, 2009, 2012a, 2016a). I define mentoring as formally or informally seeking out ways to
intentionally develop other teachers. All seven described how they used the “tools” from the DILI – including their understanding of adult development and the ways of knowing and their ability to differentiate for their mentees developmental needs – when engaging in conversations (Drago-Severson, 2009; Drago-Severson & Blum De-Stefano, 2016, 2018a, 2020). Four of them (4/13) spoke of how they took on formal mentorship responsibilities (i.e. were asked to serve as mentors to new or struggling teachers) and three others (3/13) described how they informally mentored teachers.

To illuminate this claim, I discuss Fatima, Rosa, Cathy, and Angelica who spoke about the three types of mentoring that were discussed by the DILI completers (i.e., formal mentors, informal mentors, and comparing past experiences). I review how Fatima supported a struggling veteran teacher by using “a lot of the strategies” from the DILI and ultimately the reluctant teacher started to seek out her support. I share how Rosa informally mentored others who struggled by being “available” and “really listening” so she could support them. I chose to highlight Fatima and Rosa’s stories because they mirror what other participants said. To demonstrate two slightly different stances, I also illuminate Cathy and Angelica’s experiences. Both Cathy and Angelica, differed since they had mentored new teachers before, and they each spoke of the difference between their previous experience and how using the “tools” of the DILI has given them “the right language to communicate” as noted by Cathy.

“I used a lot of the strategies I learned in leadership to try and help.” Fatima, a teacher in her 50s with 20 years of teaching experience, said that she was asked, as a teacher leader, to mentor struggling colleagues. Fatima explained how she leaned on the strategies she learned in the DILI, which she refers to as “Leadership.”

I had the opportunity to mentor a peer who had some struggles within the classroom and… I used a lot of the strategies I learned in Leadership to try and help him. And we
ended up collaborating throughout the whole year. By the end, he was seeking me out, which I thought was a positive. [I also mentored] a different teacher who struggled within the classroom, especially with communication… After Leadership, I picked up strategies to try and help him get more comfortable communicating so that it was more of a cohesive environment for the children.

As she described it, Fatima used “a lot of the strategies” (i.e. ways of knowing and critical conversations) from the DILI to be of help to her mentees. She described how she worked to form relationships and would collaborate on challenges together.

“I Definitely Reach Out to More People.”

Similarly, Rosa, a teacher in her 50s with almost two decades of teaching experience, demonstrated how she mentored teachers – but in an informal way.

I definitely reach out to more people. I enjoy mentoring other teachers. I try to always make myself available to, mentor and help in any way that I can. When teachers confide in me if they're having difficulty with things, I try to really take the time to listen to them.

Rosa shared how she will now informally support teachers by making time to “help and listen.” She also described how she intentionally uses listening (i.e., a key developmental support) as a way to support others when they have difficulties. While she was not formally assigned to work with struggling teachers (i.e., unlike Fatima), she took it upon herself to be a source of help.

Changing Mentoring Practices. Unlike Fatima and Rosa for whom mentoring was new, Cathy and Angelica (both teachers in their fifties with over two decades of experience) had previously mentored new teachers. After learning about the ways of knowing and other developmentally intentional “tools,” they found their approach had changed.

“The Right Words to Communicate.”

Cathy described how, by using the ways of knowing in her leadership practice, she could provide greater support. “I wish I had [the DILI] under my belt to have those conversations [and] the right words to communicate with someone before now.” Cathy felt more effective in her
communication and ability to support student teachers in her care because of her learnings from the DILI. Similarly, Angelica shared, “I mentored a new teacher and the ways of knowing definitely helped me mentor her better.” Using her knowledge of the ways of knowing and other strategies she learned in the DILI informed the way she supported others.

Fatima, Rosa, Cathy, and Angelica shared that they transferred their learnings about adult development (i.e., the ways of knowing; creating holding environments for others) to provide “support” to teachers in need as they assumed greater leadership responsibilities as mentors to others. In the next section, I discuss more informal acts of leadership (i.e., the ways that participants intentionally attempted to build trust and be accessible to support others), which was reported by five of the 13 participants who completed the DILI.

**Informal Acts of Leadership**

A third way that the DILI completers transferred their learnings from the DILI to the district and assumed greater responsibility was through informal acts of teacher leadership (5/13). That is, informally participants intentionally made time to check in with others, build trust, and tried to be of help to others. The participants revealed that this included not just focusing on their work as teachers but making space amidst their ongoing teaching responsibilities to intentionally make time to check-in on others, build relationships, and model vulnerability as a way to offer support as an act of teacher leadership.

To illustrate, I share how Katie, Elizabeth, and Mary spoke of intentionally incorporating these informal acts of leadership (i.e., check-ins, personal conversations, and celebrations) as a way they assumed the leadership responsibility of supporting others. It is important to note that how the participants engaged in these informal acts of leadership varied. Katie, Elizabeth, and Mary’s experiences represent the different ways the teachers assumed informal acts of teacher
leadership. Katie made an effort to be “approachable” while Elizabeth felt “appreciated” in the DILI meetings and began to make time to extend that feeling to her colleagues. Mary recognized the power of being “vulnerable” and began to “trust others.”

“Maybe I Wasn’t Approachable.”

Katie, a teacher in her 40s with almost two decades of teaching experience, succinctly described how she developed a new intentionality to be a resource to others and it changed her peer relationships.

Maybe I wasn't approachable. I feel like I made myself a little bit more approachable and I showed vulnerability, I was practicing what I learned with communication. I created that environment of trust and it was such a great experience.

Katie recognized that it was important to be “approachable” as a teacher leader. She did this by being “vulnerable” and using what she “learned with communication” to try to build a trusting “environment” as a way to support others.

“Taking the Time to Let People Know that They're Appreciated.”

Elizabeth, a teacher in her 40s with over two decades of teaching experience, described how she felt supported by the “tone” of the DILI meetings. She tried to extend this same support to others by “making time.”

[I learned that] if you start talking to somebody about how they're doing, you start to gain trust. I have more gratitude and [have found] just simple, thank you’s and things like that, go so, so far. I feel like sometimes we just kind of go through our day to day and, [in the DILI] we set the tone in those meetings with appreciation and gratitude and it was small, but it was so impactful and I feel like that went a long way. And taking the time to let people know that they're appreciated was a big one for me. [Now,] I check-in almost daily and just ask how they’re doing, and if I can help in any way. There wasn’t trust before because I didn’t necessarily take the time to get to know people.

Elizabeth recognized how the time specifically set aside in the DILI meetings for “appreciation” had helped her feel valued. She wanted to transfer that sentiment of gratitude to her colleagues. She newly took time to check-in and offer help as a way to build trust between her and her
colleagues. Elizabeth said she felt that this DILI practice helped to cultivate an atmosphere where the teachers cared and appreciated one another, both in the DILI and back in her school.

“I Reached Out to My Teammates for Coffee and Phone Calls, and Showed Vulnerability.”

Like Elizabeth, Mary, a teacher in her 50s with about two decades of teaching experience, realized that she had not been making the time to get to know her colleagues or open up to them. One way that she transferred her learnings from the DILI and sought to support others was by being more “vulnerable.” This was another explicit tool/approach taught in the DILI. Mary began to intentionally take time to check-in on her teammates and reached out more as a way to “build trust.”

I didn't really trust people with my vulnerability. So, I reached out to my teammates for coffee and phone calls, and showed vulnerability myself. That helped them to open up to me. Also, informally, in the hallway just popping into their classroom, asking how they're doing when I had a free moment. Those were just, some things that, I transferred in to my leadership.

Mary described opening herself up and modelling vulnerability – something that was initially hard for her to do. She also made time to “ask how her colleagues were” and tried to “open up informally” as a way to extend support to others.

In the next section, I describe the fourth act of leadership described by the DILI completers – the introduction of developmentally intentional teaming protocols.

Introducing Developmentally Intentional Teaming Protocols

All 13 participants (13/13) transferred developmentally intentional teaming protocols that they learned about and experienced in the DILI to their practice as teacher leaders. To support transfer, the participants experienced the developmentally intentional teaming protocols in team meetings and were encouraged to use them with their colleagues. This act of leadership enabled them to make their teams (i.e., either grade level teams or departmental teams) “safe and
productive learning environments.” These protocols include facilitating check-ins, setting norms, having an agenda, taking team surveys (Drago-Severson, 2009, 2012a, 2016a) and incorporating celebrations to build trust and relationships.

- All of the DILI completers (13/13) started to establish agendas for their team meetings utilizing their learnings and experience from the DILI.
- All of the DILI completers (13/13) created formal norms for their team meetings utilizing the developmental protocols they experienced in the DILI.
- Nearly all of the DILI completers (11/13) administered surveys to identify strengths and areas of growth for their team meetings utilizing the developmental protocols they experienced in the DILI.
- Nine DILI completers (9/13) started using check-ins in their team meetings utilizing the protocol they experienced in the DILI.
- Eight DILI completers (8/13) added intentional celebrations in their team meetings utilizing the protocols they experienced in the DILI.

The teachers in my study shared stories of how they initially could not identify ways to improve their teams. However, as they experienced the structure of the DILI team meeting where they experienced and learned about the developmentally intentional “tools” for team meetings (Drago-Severson, 2009, 2012a, 2016a) over time, they could not help but compare that experience to their building, content area, and team meetings. Thus, they began to identify ways to improve their teams. They sought to develop their teams by introducing the developmentally intentional teaming protocols that they experienced in the DILI. All 13 participants expressed a common sentiment that was succinctly captured by Emma as she described the development of a greater awareness of how their team meetings could be different and more productive, “As a
team we were beginning to become more aware of making sure that we managed our time in a meaningful way.” Below, I share some of the DILI completers’ stories of recognizing and transferring learnings from the DILI to their teams (i.e. setting norms, using developmental intentionality to support others, and taking team surveys (Drago-Severson, 2009, 2012a, 2016a). I also share the perspective of one of the Non-Completers, who attempted to transfer teaming protocols but was not able to. I conclude with the administrators’ observations of the way these protocols influenced the teams and the schools as a whole.

**Recognizing Shortcomings in Team Dynamics**

Thirteen of the DILI completers expressed in their interviews that while they had not particularly valued their team meetings they also had not previously understood the ways their teams (e.g., their team meeting) were falling short or how they could be improved upon. Interestingly, this finding connected to a survey finding as the teachers in the district did not report that. Recall a point from Chapter V, when I reviewed survey data findings from 53 teachers in the district whose most common response in their open-ended responses was that they did not have any challenges on their teams. One possibility could be that like the DILI completers reported, prior to experiencing the DILI themselves they too could not recognize ways to improve their teams. I explore this point further as I share the experience of two DILI participants, Franny and Mary who most typically described how they didn’t “see any problems” with their teams, at first.

“I Moved From [Thinking] Our Team is in a Good Place, [to] Recognizing We Really Weren't in a Good Place.” Franny, a teacher in her 50s with almost two decades of teaching experience, explained how her participation in the DILI helped her recognize ways her team could improve.
The whole structure of our sessions in the [DILI] was a really good guide for talking about teaming and norms and research like how one bad apple effects the climate of the team. [We learned about] the concept of, going from good to great and not sitting back on our laurels, but asking, “What can we do to be better? How can we work better together?” And that is something I feel I was able to transfer really well.

Franny said that she recognized her team had areas that could be improved upon, as she noted “We weren’t in a good place.” She credits even her ability to recognize this to her experience in the DILI. She described the DILI as a “really good guide” – a model for working together as a team – that led her to ask, “What can we do better and how can we work better together?”

Franny continued by describing the actions she transferred from the DILI to improve her team.

I implemented an agenda and norms, and now we have more productive meetings. I think it's transferred to having more open conversations and a truly collaborative environment in our team. It allowed us to, talk about difficult things. [Now we] respect each other’s opinions and there's not one person who is monopolizing the conversation.

Franny first recognized ways her team could be improved upon, and then she transferred specific tools from the DILI. Specifically, she referenced Drago-Severson’s Learning Oriented Leadership’s developmental norm setting protocol, and developmental team survey to support a stronger team.

“I Didn't Realize What I Didn't Know.” Like Franny, Mary, a teacher in her 50s with almost two decades of experience did not recognize how her team could be improved at first.

I was oblivious to any problems that existed within my grade level team. I felt like we were a really great team, there were no issues, and I was a really good team leader. But I didn't realize what I didn't know. As I experienced [the DILI], I realized there were some issues with trust and collaboration in my group.

Just as Franny first had to come to terms with the fact that the team she led – and thereby her own leadership – was falling short, so did Mary. Mary described how she started to take action.

I remember the first time I gave the survey, and it... brought to light a problem that we didn't want to recognize. People were feeling that there was inequity about the tasks that were being done by everybody. [And] the bad apple sometimes took over our team. The [DILI] pushed me [and] most of my team members. It made them uncomfortable and
they didn't want to address the problem that obviously existed on the team. I thought of all of the skills that we learned to help us strengthen our teams. [For example,] setting norms, the ways of knowing, checking in with people – just formally and informally. [And] I was very surprised by the power of setting norms as a team and sticking to it. It made our team meetings run much more smoothly. I feel like I'm a better leader.

Mary transferred learnings from the DILI to improve her team and felt “pushed” by the DILI cohort to do so. Even though it was “uncomfortable” to address the “inequities and bad apple,” she persisted. By bad apple, Mary is referring to a person on her team who was negatively influencing the team (Felps et al., 2006). She relied on tools she learned in the DILI to assume more active and developmentally intentional leadership, as she described how she took action to address obstacles her team was facing.

While neither the survey nor my interview protocols asked the teachers in the MELC school districts about the effectiveness of their team meetings, both Mary and Franny explicitly articulated a theme that emerged from both my survey and the interview data. For far too many teachers in the district, team meetings simply were not effective. Participating in the DILI, however, helped them recognize ways their teams could be improved. More specifically, experiencing and learning about developmental teaming protocols in the DILI assisted the participants in being able to identify ways to improve their teams and also provided a set of tools that they could use for teams improvement.

**Transferring Teaming Protocols**

Each of the DILI completers (13/13) transferred at least two teaming protocols *establishing an agenda* and *creating team norms* – to their teams as part of assuming a greater (teacher) leadership role. The DILI adopted a developmental approach to teaming. These developmentally intentional teaming protocols (e.g., adopted from Drago-Severson’s Learning-Oriented Leadership model)—namely, setting norms, taking a team survey, check ins, and check
outs, and giving feedback that attends to developmental diversity) were included in the DILI to create and model on how to build a learning environment that can support developmental diversity, which will exist in any group (Drago-Severson, 2009, 2012a, 2016a). In addition, the DILI curriculum included opportunities to engage with scholarly research about team dynamics that the participants often turned to their own teams [e.g., Brown’s (2018) Dare to Lead; Collins’ (2009) Good to Great; Felps et al., (2006) Does One Bad Apple Spoil the Bunch; Haas & Mortensens’, (2016) The Secrets of Great Teamwork; Rath’s (2007) Strengthsfinder 2.0]. This supported the participants in reflecting on team dynamics, creating a parking lot (i.e. an uninterrupted space for questions), and making space to celebrate accomplishments, birthdays, and personal milestones. Only three DILI completers (i.e., Joan, Angelica, and Fatima) reported transferring fewer than four of these protocols to their teams. For this claim, I chose Fatima and Joan to illustrate the value of transferring these teaming protocols because even though they transferred the fewest protocols, they reported in their interviews that the influence of these protocols was so valuable that it created more productive teams meetings. I explain how Fatima, a teacher in her 50s with over two decades of teaching experience, transferred check ins, norms, and an agenda into her meetings and it “proved so much more effective.” Joan, a teacher in her 30s with five years of teaching experience, saw how her team transformed from “a free for all” to “effective” as she introduced norms and an agenda.

“In the Past We Wouldn’t Accomplish the Mission of the Meeting.” Fatima immediately saw that the teaming protocols she was learning in the DILI could help her team.

In the past, we would always get off tangent or we wouldn't accomplish the mission of the meeting. At the time we didn't have a practice of having a formal agenda and a check-in at the beginning. From day one [of the DILI], I went back to our team and set the agenda. [Another] thing we did right away, is set norms for ourselves to recognize what everyone is comfortable with. Those things, the agenda and the norms were something
that was introduced in leadership [the DILI], and we transferred to our team. It really proved so much more effective.

Fatima described how she “transferred setting norms, an agenda, and check-ins” to her team and how this “proved so much more effective.” She continued to share a story about how this helped.

One of my coworkers had this habit of oversharing. He would take control of the meeting and share everything about himself to the extent that no one else would be able to speak. Some people would get insulted by the things he would share, because it was definitely not appropriate for the workplace. So, when we were setting the norms, we made sure to include the appropriateness of what we're going to discuss and putting things on the agenda allowed us to stay focused. It allowed a designated time to check-in and he would be one of the last people to go so that everyone else would speak first and he would recognize the modeling of only speaking for a minute and not oversharin.

Fatima found that transferring an agenda, and norms helped her team overcome their challenge of “getting off tangent and not accomplishing the goal of the meeting.” She further described that this resulted in more productive team meetings where they began to “get through their agenda and actually collaborate on lesson plans and student needs.”

“It was the first time I was introduced to the fact that it could be done differently. And it’s so different.” Similarly, Joan discussed how introducing teaming protocols changed her team.

The idea of norms was probably most helpful, in my practice. We never did that [before]. It was a free for all in our meetings. And it was the first time I was introduced to the fact that it could be done differently. And it's so different than how we used to function. Three years ago, I feel like we didn't really have a team. Everybody just did their own thing. There was very little collaboration. We wouldn't take time to work together… cohesively. [Now] we prioritize and collaborate, we're spending our time effectively.

Joan considered her team to be a “free for all” and not “really a team.” Following the introduction of norms and an agenda, her team became – in her view – “effective.”

**The Non-Completers**

Anne, a teacher in her 40s with over two decades of teaching experience, who did not complete the DILI program, attempted to transfer her learnings from the DILI in the form of a
teaming protocol to support her team. She described the resistance she faced when she tried to introduce an agenda and norms.

It was a struggle for the other team members because we learned about creating safe spaces and norms and communication and being vulnerable [in the DILI] but for people who were not on the leadership cohort, it was really difficult for them to be open to understanding it.

Anne noted how she faced resistance that she tried to overcome including how others were “resentful.” As discussed in Chapter VI, Anne did not have the support of another DILI-participating team member to overcome this challenge by modelling these new practices with her. Thus, none of the non-completers (0/3) transferred their learnings to their team. Anne’s story represents the only attempt to do so.

I now turn to the administrator’s stories to share how the teachers’ efforts were received on a building and district level.

From the Lens of the Administrator: Introducing Developmentally Intentional Teaming Protocols

All of the administrators (6/6) confirmed that each of the 13 DILI completers whom they directly supervised assumed greater leadership and transferred their learnings from the DILI by introducing teaming protocols to their teams. For example, Nicholas described how he saw conversations, norms, and agendas being “modeled.” Similarly, Bud described a particularly challenging team that began to use their time "more effectively." And Lynda noticed a “ripple effect,” as the non-DILI participants began to “rally” and worked alongside the DILI completers to hold others accountable for their teams’ productivity.

“That Wasn’t Taking Place Before.” Nicholas, a building principal in his 40s with over two decades of teaching and administrative experience, attributed improved meetings to his teachers’ experience in the DILI.
At least every two weeks, I stop by teams and I stopped by a grade team and they were having a problem with one or two people. And I noticed that one person specifically who is on Leadership… [She was modeling] how to have a conversation: there were agendas, and the norms were set. Just seeing the quality of that team meeting time was a product of [the DILI].

Nicholas noticed how his teachers were using the developmentally intentional protocols to raise the “quality” of team meetings, citing “more of a team atmosphere.” He continued “the team is more collaborative in how they go about their business… ideas are freely mentioned… [Such as] I'll share this with you after school… that wasn't taking place before.” Nicholas shared how these acts of leadership changed the tone of the meetings, to create a “better atmosphere and experience” and ultimately influenced the building as a whole.

I saw, not in all of them, but in most of them, an increase of professionalism and taking on added responsibility… [The things they learned in leadership] are hard concepts to hold. It's great to learn it, but when you actually have to go about having a tough conversation with a person – that's difficult to do… So, what I saw was the teachers being more open to take on those roles and responsibilities, initiating, leadership roles, if something needed to be done and they didn’t need to come to me about everything. [It influenced the school because] specific people on leadership where you saw that skill kind of coming out, those norms, those expectations… you definitely see an increase in the team how they work because the expectations were raised. And you hope that what the average was, is no longer average anymore, because our above average is now excellent in the way they conduct themselves. So, you hope that they gravitate up.

Nicholas said that the teachers acts of leadership increased “professionalism” and “raised the bar” for everyone.

“Time is Being Utilized More Effectively.” Bud, a district administrator in his 40s with over two decades of teaching and administrative experience, described how a challenging team dynamic was transformed with the collective efforts of the DILI completers and the other members of one team.

The personalities on that team, made it really difficult to get things accomplished. And so [one DILI completer] utilized the norms and some of the strategies to have critical
conversations to put her foot down and say, “here's the structure to keep to the agenda.” Now other teachers on the team also reference the norms when somebody gets off task or if somebody has their phone and her [team’s] time is being utilized more effectively.

Bud illustrates that these “norms” became expectations that everyone came to rely on and reinforce. He was particularly struck by the level of conversation that began to take place as he observed the DILI completers transferring their learnings and assuming greater leadership roles.

Learning the power of... collaboration and those conversations, [as well as] the norms that the [teams] created… and [as a result] the team is more productive, they get more done. They always were hard workers... However, now they’re more effective with time management. So… they're getting a lot more out of the time.

Bud described how the teaming protocols and critical conversation techniques led to more productive team meetings and as a result the team is able to “get more done.”

“The Rest of Them Rallied Around It. This Is Our Own 40-Minute Period, We're Having a Conversation, We're Following an Agenda.” Lynda, a district level administrator in her 50s with over two decades of experience, described how she watched two DILI-completers transform a particularly challenging team. Like Bud, she noticed that other members of the team who were not in the DILI started to support and reinforce the teaming protocols.

The more difficult team members would sit in the back of the room during team meetings and open up their laptops. So, they weren't listening to [each other in] the team meetings. The [leadership participants] made a team norm that said, “No laptops, we're [going to] all sit in a circle.” And while the other two team members pushed back, the rest of them rallied around it. “This is our own 40-minute period, we're having a conversation, we're following an agenda.” They found that it worked.

Lynda noted that the DILI members worked together to successfully push back against the resistance that arose from other members of the team with teaming protocols (e.g., “norms”).

These are stories from the administrators that corroborate the teachers’ descriptions of more productive team meetings. However, some went further. For example, Lynda cited how the
administrators themselves brought learnings from the DILI back to their own practices, modeling them for all of their faculty.

I’ve seen teams that don’t have a team member on the leadership cohort on their team. However, they created norms for their team. So, by having the administrators also model norms in [whole school] faculty meetings and through the subcommittee meetings you see the ripple effects and how meaningful creating those norms were.

Lynda said that by having “administrators model norms” and teachers participate in meetings with team norms, it created “ripple effects.” Meaning, non-DILI participants came to “realize how meaningful norms were” and sought to implement them in their other team settings even without a DILI completer on their team, as the culture began to shift and team meetings with agendas and norms became standard instead.

**Leadership Roles Summary**

All 13 DILI completers reported that they transferred their learnings from the DILI to assume greater leadership responsibilities. This included leading professional development (11/13), mentoring teachers (7/13), informal acts of leadership (5/13) and introducing teaming protocols (13/13). The administrators (6/6) reported that the influence of the teacher leaders ultimately elevated the level of professionalism across the district and fostered more collaborative and productive team meetings. They also said that this had a “ripple effect” and supported those who were not direct participants of the DILI. Nicholas succinctly summarized this sentiment stating, “You definitely see an increase in how the team works as the expectations were raised.”

In the next section, I share my second transfer finding, that the participants’ experienced personal outcomes including feeling more empowered.
Transfer Finding 2: Increased Empowerment

In this section, I explore my second transfer finding. All of DILI completers (13/13) reported increased empowerment as they assumed leadership responsibilities. Participants used the word “confidence” repeatedly as they spoke about finding their voice, speaking up, and feeling more comfortable assuming leadership. This increase in confidence is typical when teacher leaders receive leadership training (Berg et al., 2019; Coughlin, 2015; Langer-Banker, 2017; Lowery-Moore et al., 2016; Silva et al., 2000). Throughout my analysis, I describe how the participants connected their gains in efficacy to newly assumed acts of teacher leadership.

Each of the DILI completers described how they brought renewed empowerment to their practice as teacher leaders. I see two aspects of feeling empowered and one other aspect more related to acting empowered. These are shown in Table 21.

Table 21

Empowerment of the Teacher Leaders

<table>
<thead>
<tr>
<th>Form of Empowerment</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gains in Confidence</td>
<td>11</td>
<td>Emma, Fatima, Elizabeth, Mary, Edith, Franny, Joan, Cathy, Rosa, Gabriella, Patricia</td>
</tr>
<tr>
<td>Feeling More Valued</td>
<td>9</td>
<td>Emma, Angelica, Fatima, Elizabeth, Mary, Edith, Joan, Rosa, Katie.</td>
</tr>
<tr>
<td>Speaking Up</td>
<td>11</td>
<td>Emma, Fatima, Elizabeth, Edith, Franny, Joan, Angelica, Rosa, Gabriella, Patricia,</td>
</tr>
</tbody>
</table>

As Table 21 shows 11 of the DILI completers (11/13) reported that they felt more confident, and two-thirds of them (9/13) also reported feeling more valued by others. Taken together, all of the DILI completers (13/13) spoke of feeling more confident and/or feeling more...
valued. Ten (10/13) went on to say that this new empowerment led them to speak up (or to speak up more) with their colleagues.

This last theme is important as it directly addresses a gap in the literature. While other studies have found that teacher leadership preparation programs – especially university-based programs – often result in feelings of empowerment, this feeling does not always translate into new behaviors or acts of teacher leadership in their schools (Ado, 2016; Silva et al., 2000; Snoek & Volman, 2014). The third theme might also lend support to the idea that this kind of developmentally-oriented teacher leadership program (and research) can address this gap.

In the sections that follow, I describe the ways in which the DILI completers reported their increased feelings of empowerment. I first discuss how the teacher leaders’ feelings of empowerment took the form of gains in confidence and in feeling valued by their colleagues. I then explore how the participants transferred these feelings of empowerment into actions as they grew to believe that they had value to contribute beyond their classrooms and they “found” their voice to express their beliefs. Taken together, empowerment “gave them confidence to accept new leadership roles.” I conclude this subsection with the perspective of the administrators who directly supervise these teachers.

**Gains in Confidence and Feeling Valued**

All of the DILI completers (13/13) reported feelings of empowerment. They all stated that they were more confident (11/13) and felt more valued by others (9/13). They transferred these feelings of confidence, value, and empowerment into their leadership practices. Some used those actual words (e.g., Emma said that she grew more “confident in my ability to be a leader”), while others spoke about these themes using other language such as feeling “valued” in the words of Joan or “more confident” in the words of Fatima. To illuminate this claim, I highlight
the stories of three participants. Joan emphasized that her empowerment came in the form of believing that what she knew was “valuable,” despite her relatively young age. Franny described how, as her “confidence grew,” she was “not afraid of making a mistake,” and Fatima shared how she began to feel as though she had “value to add.” I present the experiences of the teacher leaders whose stories best capture the similarities and differences voiced by the 13 participants who expressed empowerment as a gain in their confidence or their feelings of value.

“I am More Confident, Which has Helped Me Advocate for Our Kids in a Way that I Need To.”

Joan, a teacher in her 30s with less than a decade of teaching experience, explained that after participating in the DILI she became more empowered, and more secure in taking a stance for her students.

I believe that what I knew was valuable… and I’m more purposeful. I make better decisions and I am more professional in how I approach things. I am more confident, which has helped me advocate for our kids in a way that I need to. I learned that I could do these things. I could be more assertive and be more of a leader. And it doesn’t matter if somebody had more experience than I did, but I could take that role on because I knew that I could do this.

Joan said that because she is “more confident” she is better able to “advocate for our kids” and that she had become “more of a leader” with her peers. This confidence helped her to work at a higher level. She reminded herself that regardless of others’ experience, she “knew I could do it.” Like others, Joan described how her gains in confidence translated to being “more comfortable in my leadership role” as a teacher, a teacher leader, and an advocate for students.

“I Feel Much More Confident and Therefore More Competent.”

Franny, a teacher in her 50s with almost two decades of teaching experience, also found that as her confidence grew, she became more focused on her work, and was no longer afraid to make a mistake or misspeak to someone.
As a leader, I feel more comfortable in my leadership roles at the school, feeling more confident in what I'm doing because I understand myself better... I'm not worrying about being a pleaser, or if somebody is not [going to] like me if I speak up. [The DILI] has helped me to be more honest and vulnerable, but it's also helped me to direct others instead of wavering, and I'm not afraid to take a chance and make a mistake and learn from that mistake.

Franny described her confidence and leadership as being “more honest, vulnerable”, and that she has a new ability to “direct others and not be afraid of mistakes.” She came to worry less about what others thought and gave herself permission to be “direct instead of wavering.” Franny credited this gain in confidence with being able to better execute her teaching and leadership responsibilities, “I feel much more confident and therefore more competent.”

“I Have Value to Others.”

Fatima, a teacher in her 50s with almost two decades of teaching experience, shared that she felt increasingly empowered as she started to feel that her opinions were valued.

[The DILI] has been helpful to build my confidence and recognize the fact that other people respect and value my opinions. I... have value to others. And others’ experiences have value to me. Now, I feel like I'm sought after and people come to me and say, “You’re on leadership, what do you think?” “What would you do in this?” or “How would you deal with this person?” Or, “Can you help me address my teammate who you don't work with, but I'm not sure how to go about saying this to them?”

Fatima began to feel “valu[able] to others” when her colleagues came to her for help, and gained “confidence as she came to recognize that others respected” her opinions.

All 13 of the teacher leaders expressed gains in confidence or feelings of value, as Elizabeth summarized, “I began believing in myself.” The participants also shared that these gains in empowerment supported their practice as teacher leaders since they felt more comfortable taking risks and taking a stance.
From the Lens of the Administrator: Feelings of Empowerment

All of the administrators (6/6) noted that the teachers had become more confident and over time, this transferred to their acts of teacher leadership. Elmer described how he believed that the DILI “builds confidence.” Bud also noticed the gains in confidence noting that the “confidence level has risen” and that this helped strong teachers to be able to “vocalize.” Elmer and Bud were the most representative of all six administrators who spoke of the ways the teachers gained greater confidence over the course of the three-year DILI.

“The Confidence to Present to Colleagues and Be Vulnerable.”

Elmer, a district administrator in his 50s with over two decades of administrative experience, shared that he was struck by the way the DILI promoted gains of confidence for the individual teachers.

Through the leadership cohort, one of the things that builds is the confidence for you. It's one thing for you to feel you've mastered something or that you're the go-to person for it. It's another thing to present it to other people. And I think [the DILI] gives you the confidence to do that and to talk that way in front of colleagues and be vulnerable.

Elmer connected this increased empowerment to the critical practice of showing “vulnerability.” He noticed that the teacher leaders became more willing to share their content knowledge, and this (in turn) produced even more significant transfer into leadership practices.

“Strong Teachers…Didn’t Really Vocalize. They Kind of Did Their Own Thing.”

Like Elmer, Bud, a district administrator in his 40s with over two decades of teaching and administrative experience, observed the way the teacher leaders started to move beyond “doing their own thing.”

The confidence level has risen with the teachers in the cohort. You're seeing some teachers that were strong teachers, but you didn't really see them vocalize. They kind of did their own thing. There’s many levels that I've seen them grow. I see those teachers now taking these leadership roles, [having] critical conversations, wanting to lead
trainings, wanting to go into teams, and do a training for a grade level team... I've seen huge growth [in] all of them.

Bud noted that the “confidence level has risen in the cohort” – in “all of them.” He went further, citing many specific kinds of transfer to acts of leadership (e.g., leading “critical conversations,” “leading trainings”). Bud also described an example of how one DILI completer transformed into a teacher leader.

Patricia was always a strong teacher, effective in the classroom, but very quiet. She did her own thing. But [she didn’t] transfer that… she [just] did her work in her classroom. [Now] she wants to be a part of the district more. Whether it's teaching professional development for her colleagues, writing curriculum, or sharing something during the leadership meeting. Those were things she volunteered to do. I didn't see her do those sorts of things prior to the leadership [cohort].

This is the very epitome of an effective teacher becoming a teacher leader. Bud points to Patricia’s growth in confidence as a catalyst for her from doing “her own thing” to assuming greater responsibilities as a teacher leader. She wanted to be “part of the district more.”

Elmer and Bud’s observations – like those of the other administrators – only echo what the DILI completers shared. Their increased feelings of confidence and value directly led to assuming additional leadership responsibilities.

In the next section, I discuss the second part of empowerment.

Value in Their Contributions and Gaining Voice

Over three-quarters of the DILI completers (10/13) emphasized that participating in the DILI enabled them to “find their voice” and to “speak up” about professional matters. Nearly half of them (6/13) spoke specifically about coming to believe their contributions outside of their classrooms were “valuable.” This voice outside of their own classroom work is teacher leadership (Silva et al., 2000; Wenner & Campbell, 2017). While they had previously kept their feelings and opinions – and even knowledge and expertise – to themselves, their experiences and
learnings from the DILI led them to speak up, contribute, and share their feelings in new ways. In fact, six of the participants (6/13) used the phrase “I found my voice,” and even more said something like, “I didn’t have much of a voice” (9/13).

**Believing They Have Value to Contribute**

As the participants reflected on how they came to feel more empowered and found their voice, they described how previously they did not speak up because they did not feel as though what they had to say was valuable. For example, Angelica, a teacher in her 50s with over two decades of teaching experience, was “afraid” that what she had to say was “stupid and not worthy” and Fatima, a teacher in her 50s with over two decades of teaching experience, came to find she “could help.” These teachers are typical of how the six DILI completers spoke about coming to believe that their opinions had value for their teams and colleagues.

“**Somebody Would Think it was Stupid and Not Worthy.**” Angelica reflected on how she newly “speaks” and the fear that she had to overcome to be able to do so.

> Before I would've not spoken and now I speak. [I realize] my opinion or my feelings are just as important as someone else's. And before I was afraid that if I said something, somebody would think it was stupid and not worthy.

To Angelica, gaining her voice meant that she gained confidence and began to realize the value of her potential contributions, relative to others. She no longer worried that others would think she was “stupid” and recognized that what she had to contribute was in fact “worthy” of sharing.

“**I Am Not Afraid to Make My Voice Heard.**” Fatima revealed that she too would refrain from sharing her thoughts because she worried if what she had to say was good enough.

> Before, in the earlier years, I did not necessarily feel comfortable thinking I had something to contribute to helping my colleagues grow. I did not have much of a voice…Now I am not afraid to speak up at team meetings. And I am not afraid to make my voice heard.
For Fatima, finding her voice coincided with increased gains in confidence as she began to feel as though she had “something to contribute.” And she was then no longer “afraid” to speak up. Like Angelica, Fatima did not feel “comfortable” to say her thoughts. This resulted in her “not having a voice” and being afraid to “speak up” and be “heard.” She described how as she gained confidence she also began to feel that she had valuable contributions to make. Given this, she began to speak up in new ways.

As the participants gained feelings of confidence, value, and empowerment as they recognized that their contributions did matter, and they began to take a stance for what they believed in as they “found their voice” and started to “speak up.”

**Speaking Up**

Simultaneous to the participants’ descriptions of feeling more empowered through gains in their confidence and feelings of value, 10 of the DILI completers (10/13) described how they began to speak up in new ways, to greater and lesser degrees. To them, the mere fact that they were speaking up as teacher leaders was a notable change. All 10 said that previously they “would not have spoken.” Emma, a teacher in her 40s with two decades of teaching experience most typically summarized this sentiment as she described how she started to speak up once she realized “I have something to offer.” As the DILI completers found their voice they also described how it supported their leadership practice. To illuminate this claim, I describe the most representative examples by highlighting how Elizabeth learned she “has a voice” and recognized that she would no longer just go “along with the masses.” Similarly, Rosa realized her voice could “make a difference.”

“I Learned I Have a Voice.” Elizabeth, a teacher in her 40s with almost two decades of teaching experience, shared how finding her voice supported her work as a teacher leader. “[In
the past] I probably would have just gone along with the pack… Now I have the ability to speak up and give my opinion or insight. I've learned I have a voice and prior to this I just went along with the masses.” Elizabeth noted that before the DILI she wouldn’t give her “opinion or insight.” She shared an example of how this confidence led her to speak up and changed her relationships with her colleagues and their practices in their classrooms.

I give a lot of reading assessments. And in the past, I would just do it for [other] teachers’ [students]. I think [my confidence] changed my tone because it's so important for them to actually sit and do the assessments with me so that they can understand the type of learners in their classroom. So instead of having the teacher working around the room and getting stuff done while I do the assessment, I say, “No, this is important for you to sit and watch me give the assessment so you get to understand [your] student.” And I wouldn't have done that prior to being [in the] cohort. I would've just continued just to do it for them.

Elizabeth was clear that as she gained confidence, it allowed her to take a stance and hold her fellow teachers accountable in new ways, such as increasing their learning.

“**What Difference Does it Make Anyway?**” Rosa, a teacher in her 50s with over two decades of teaching experience, started to feel her contributions mattered. She linked her increased confidence *in her efficacy* to her new abilities to speak up.

I would remember feeling frustrated a lot during team meetings. Not speaking up, just rolling with the flow, thinking, “What difference does that make, anyway?” I’d just rather sit here.” And that's something that I learned in [the DILI]. It's difficult to step up and out of my comfort zone. Sometimes in the past I wouldn't say anything because I didn't think it mattered or anything was [going to] change. But now I think my voice has promoted change. Before I would have let others make the decisions and now I speak up and offer more guidance and support to others. I've learned that my voice matters. I have more confidence in my ability to be a teacher and leader.

Rosa learned “my voice matters.” This gave her “more confidence” and helped her to “step out of her comfort zone,” despite it being “difficult” she started to use her voice to “speak up and offer guidance to support others” that also “promoted change.”
Ten DILI completers (10/13) reported that they “found [their] voice” and could now speak up. They said that the DILI had given them this confidence and supported their actions of speaking up – and even led to them “promot[ing] change” within their schools. The participants shared that their new confidence transformed their behavior as they shared stories of using their voice in team meetings, and in holding others accountable for their students’ learning and progress. These gains in empowerment and voice proved to be important for their work as teacher leaders. The administrators saw this in them, as well.

**From the Lens of the Administrator: Hearing Teachers’ Voices**

All of the administrators (6/6) noticed that, over time, the teacher-participants began to become more vocal during the DILI sessions and in their schools as they shared their opinions and spoke up in new ways. Half of the administrators (3/6) reported that some teachers started to use their voice to question their (i.e., the administrators’) decisions and/or share when they thought something could be improved. All of them (6/6) spoke of how the teachers’ newfound voices contributed to teacher led professional development (discussed above) as a highly visible and influential example of increased teacher leadership in the MELC district.

To illustrate this claim, I highlight the experiences of Lynda, who described how speaking up was a challenge for the cohort of teacher leaders as a whole. She shared a story of a teacher’s new capacity for difficult conversations. I then share Elmer’s story about how another teacher found her voice, and used it to lead professional development. I conclude this section with stories from Bud and Francis who shared how a third teachers’ voice informed them of how they could improve. All of these examples of increased teacher voice – are a form of teacher leadership.

**Having Challenging Conversations**
“The [Teachers in the Cohort] Started Out Having a Really Hard Time Having Difficult Conversations.” Lynda, a district administrator in her 50s with two decades of teaching and administrator experience, said that she saw how the teachers in the DILI found it especially challenging to find their voice and take part in an unpopular conversation.

The [teachers in the cohort] started out having a really hard time having difficult conversations. They recognized a lot of areas of improvement but never really addressed their complaints and took action with it. And I saw many of them just transform… they would stand up for their students and they would stand up to their teammates.

Lynda described how over the course of three years she noticed a “transformation” as the teacher leaders went from merely “recogniz[ing]” problems to actually “stand[ing] up for their students.” For example, she told a story about a DILI teacher in her 50s with almost two decades of experience.

[In the DILI] if a question came up where we were all throwing out theories or ideas, [she] didn't have much to offer in that sense. And that definitely changed. Over the three years we got into really deep conversations regarding having difficult conversations, standing up for what's right, and what you believe in. As we progressed through the cohort, she would jump into conversations and say we're not addressing these needs correctly and we're not handling this. And she was more willing to speak up as the cohort progressed.

Lynda saw this teacher begin to find her voice in the DILI and used it to openly stand up for what she believed in – demanding attention for problems she saw in her school.

“Something Really Important to Say.” Elmer, a district administrator in his 50s with over two decades of administrative experience, shared a similar story about another teacher.

To me [her speaking openly in the DILI] was the starting point, as somebody who has something really important to say and an important piece to play in this school district. I think it gave her the forum, to put herself out there a little bit, but, to be in a very comfortable place to do it. For example, she would turnkey to the rest of her colleagues on a professional development day… [By the end of the teacher leader cohort] she has this voice now and shares a lot. She has a platform that the district and other administrators, would like to hear from her. It was a great venue for her.
Elmer described how this teacher leader has “something really important to say and an important piece to play.” He went on to say “she has this voice now and shares a lot.” This is important, as it shows how she began to “try out” using her voice in the DILI and was then able to transfer her voice beyond the DILI as she assumed greater leadership responsibilities including leading professional development and sharing her perspective with teachers and administrators alike.

**Speaking Up to Administrators**

Half of the administrators (3/6) offered that the DILI completers spoke up more with them. For example, Bud (a district administrator in his 40s) and Francis (a building principal in his 50s), both of whom have over two decades of teaching and administrative experience, brought up the same teacher. Bud said, “There is also more of a willingness to talk about concerns or reach out to administrators about the struggles for the teachers.” Francis described how she lets him know when there are problems and she advocates for students and teachers.

[I noticed] a little more confidence and a little more willingness to come forward, when she wasn’t sure of, a direction we were going and just asking in a very polite manner about it. At the same time, she also brought her concerns to me so that together we could make better decisions together.

Francis and Bud both shared how she began to ask questions about their leadership decisions, and how they used her input to partner together on decisions.

**Empowerment Summary**

The participants expressed that the DILI influenced them by playing a critical role in their increased empowerment, as they transferred lessons and learnings from the DILI to their schools. Both the DILI completers (13/13) and the administrators (6/6) shared that the teacher leaders were empowered through their work in the DILI. The teachers reported gains in confidence (11/13), in feeling valued (9/13), and that they had valuable contributions to make (6/13). This contributed to them beginning to speak up more in their schools (10/13). All of the
administrators (6/6) saw this increase in voice, and half even mentioned that the DILI completers spoke up more to them.

Next, I explain how most participants reported that even though they assumed greater leadership responsibility, their newfound abilities to collaborate effectively, say no, and manage their workload, resulted in reduced stress.

**Transfer Finding 3: Reduced Feelings of Stress**

In this section I explain my last transfer finding. Over three-quarters of the DILI completers (10/13) reported feeling less stress as they transferred their learnings from the DILI to help them manage the adaptive, technical, and mixed challenges of teaching (Heifetz, 2004; Linsky & Lawrence, 2011; Wagner et al., 2006) and teacher leadership (Drago-Severson, 2009, 2012a, 2016a). They attributed this to being more willing to collaborate with others and divide the workload (8/13), learning to say “No” (5/13), and overall they felt as though they were better able to manage their responsibilities (4/13). Table 23 illustrates the learnings the participants transferred from the DILI that they contributed to reduced feelings of stress.

**Table 23**

*Stress Reduction*

<table>
<thead>
<tr>
<th>Method of Stress Reduction</th>
<th>Number of Participants</th>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborating</td>
<td>8</td>
<td>Emma, Angelica, Fatima, Rosa, Edith, Franny, Katie, Gabriella</td>
</tr>
<tr>
<td>Saying No</td>
<td>5</td>
<td>Elizabeth, Edith, Katie, Gabriella, Patricia</td>
</tr>
<tr>
<td>Capacity to Handle More</td>
<td>4</td>
<td>Emma, Angelica, Fatima, Rosa</td>
</tr>
</tbody>
</table>
In total, 10 participants (10/13) shared that by adopting tools and strategies (e.g., learning about the ways of knowing, developmentally intentional teaming protocols, and practicing critical conversations) from the DILI, they reduced their stress. A common theme across all 10 of these participants was that—before participating in and learning from the DILI—they had not known how to effectively work with others, and instead just worked by themselves. They did not have the tools to facilitate meaningful collaboration or say, “No,” so it became easier to just do the work themselves. Rosa most typically described this phenomenon saying, “I tried to do things on my own and I think that puts a lot of pressure on, yourself.” Similarly, Fatima described how challenges no longer “overwhelm” her but she has come to see them as “opportunities.” The participants reported that the DILI directly addressed these issues, and thereby reduced their stress.

Reduced Stress by Effectively Collaborating

Most DILI completers (8/13) described feeling less stressed because they developed a repertoire of skills to facilitate effective collaboration (discussed above in this chapter) and could in turn better distribute their workload. These eight participants said that previously they tried to “do things themselves,” rather than working with others. To illuminate this claim, I describe how Katie used to feel like she was “doing the bulk of the work” and now she gains “others input.”

“The Burden is not All on Me.”

Katie, a teacher in her 40s with over two decades of teaching experience, described how collaboration reduced her workload and sense of isolation.

I felt as if there was less of a burden on me to do everything. [Before] I felt like I was doing a bulk of the work and I wanted everything done a certain way so it's very hard for me to give it up and let others help. It makes your life easier and you don't feel like you're on your own island... I would have done all the work myself and just shared it, but, I would have been annoyed and now I seek others' input and do my best to work together. I feel more fulfilled, and I'm not as isolated.
Katie transferred learnings from the DILI to support her in working more collaboratively. This made her “life easier.” It reduced her stress because the “burden” was no longer just on her. While Katie was the most explicit in explaining this dynamic, seven others agreed with her.

**Reduced Stress by Learning to Say “No”**

Five DILI completers (5/13) shared that they reduced their stress by “not taking too much on,” crediting this to a newfound ability to say, “No.” This may even indicate developmental growth, as saying, “No” to valued others and supervisors often requires some sort of self-authoring capacity (Drago-Severson, 2004a, 2009, 2012a, 2016a, 2020). I illustrate this claim by sharing the experience of Elizabeth, who previously always said, “Yes, to everything.” I then describe how Gabriella learned to say “no” and “reduced her sense of responsibility and stress.”

“I was Able to Divide the Work Instead of Just Taking it On.”

Elizabeth, a teacher in her 40s with almost two decades of teaching experience, shared how she used to do “whatever you want” but learned “that isn’t the best way.”

I was always saying, “Yes,” to everything, whether it be things at work or in my personal life. It helped me understand that's not always the best method. I realized I didn't always have to be the one to volunteer to say, “Yes,” to do things. [In the past I] wouldn't have been able to even about dividing the work. It would have been like, “I'll do whatever you want.” And after the leadership cohort, I was able to collaborate and divide the work appropriately instead of just taking it on or letting someone else tell me what I should do …because it was easier to do more than my part instead of, possibly getting into some sort of confrontation, so I think that for me was the biggest change.

Elizabeth’s ability to say no, and “divide work” resulted in “the biggest change” for her as she came to understand that she “didn’t have to be the one to always say yes.” Elizabeth described how she was so afraid of confrontation that she would have “let someone else tell me what to do and would have done whatever you want” because that was easier than speaking up. Elizabeth transferred her feelings of empowerment that ultimately reduced her “amount of stress.”

“Now, I Say No.”
Gabriella spoke of how she was previously “stressed” because she would say yes to everyone and to too many things. She described that over time she learned, “I don’t need to say yes.” She recognized how she has become quite comfortable saying “no” and is confident that she is “still a leader” even if she doesn’t always say yes to everyone.

I was uncomfortable being a leader, but I knew that others saw me as a leader. And so, if they asked me to do something, I felt like I had to say, “Yes.” And now my, mindset has shifted and I don't need to say, “Yes.” I don't need to be everything to everyone and I'm still a leader. So, I say, “No.” And I'm quite comfortable saying, “No.” I was one of those people who was like, “Okay, we need to get this done.” And if they weren't doing their fair share, I would've done it all just to make sure it was done. Now I, will first say, “How are we going to set this up? What are our norms going to be?” And once we agreed to certain responsibilities, having those critical conversations to say, “This is what I've done. What have you done?” I never would've done that three years ago. I significantly reduced my, sense of responsibility, and stress connected to responsibility.

Gabriella vividly described how she learned to “say no” and that she is “still a leader.” She described transferring learnings from the DILI to facilitate collaboration so that others could be accountable, and how that divided the work load – instead of her “being everything to everyone.” She set boundaries and held others responsible with “critical conversations,” as she was clear that this “significantly reduc[ed] her sense of responsibility and stress.”

For Gabriella and other participants (5/13) transferring their learning from the DILI directly reduced their stress, as it reduced their workload and made leadership roles easier to assume. A third way that the teachers reported less stress was describing a greater ability to handle a more varied work load.

**Reduced Stress from a Capacity to Handle More**

One of the greatest barriers to teacher leadership is the many hats that teacher leaders must wear (Wenner & Campbell, 2017). Four of the DILI completers (4/13) volunteered that they felt better equipped to manage their workload, *even as they assumed greater leadership responsibilities*. I highlight how Emma has “been busier than ever,” but also has “such
satisfaction,” and how Fatima now has the “confidence to face” challenges, be “vulnerable” and is not afraid of “failing.” Angelica described that being able to better manage her stress has helped her to “find joy” again. Emma, Fatima, and Angelica most succinctly described how even though they assumed greater responsibilities they also feel “reduced feelings of stress.”

“It feels good.” Emma, a teacher in her 40s with almost two decades of teaching experience, said that she is better able to manage her increased workload. “I have been busier these last three years than I’ve ever been, but I had such satisfaction and gratitude for the opportunities. Even though they were, a challenge, it was such a great opportunity that...feels good.” Emma noted that being “busier” is no longer associated with stress but instead “satisfaction and gratitude.” She acknowledges that even the challenges feel “good.”

“I Face Challenges as an Opportunity. I Don't Look at it as a Threat.”

Fatima, a teacher in her 50s with over two decades of teaching experience, described how she has a new approach for challenges.

I feel like I face challenges as an opportunity. I don't look at it as a threat. I’m confident that I can figure out a way to tackle it. Whereas before, I was more overwhelmed. I would not have had the confidence to face them head on. I might've, stepped aside or thought that, I might fail and that would stop me from chasing it… I could get past vulnerability and fear.

Fatima said that challenges no longer “overwhelmed” her, and have become “opportunities.” Her new “confidence” got her “past vulnerability and fear.” She became empowered to take on new challenges and is no longer overwhelmed by being afraid of failing.

Four of the participants volunteered that they could handle greater responsibilities – and find even greater satisfaction from them – due to the lessons they transferred from the DILI. Angelica succinctly summarized how she is no longer “as overwhelmed” by the stresses that previously “spilled” from her personal life as she “found joy in things I was no longer finding
joy in.” Angelica, Emma, Fatima, and the other participants' stories show that while the teachers are managing greater responsibilities they simultaneously feel “satisfied and good.”

**Reduced Stress Summary**

More than three-quarters of teacher leaders who completed the DILI program reported reduced feelings of stress (10/13). They found that learning about the ways of knowing, and developmental strategies for collaboration that allowed them to divide the work load, say, “No,” and to gain confidence to handle greater challenges and responsibilities with reduced their stress.

**Chapter Summary**

In this chapter, I illustrated three ways that the DILI completers transferred their learnings from the DILI to their practice in their schools, resulting in real changes. All of them (13/13) took on leadership roles (i.e., leading professional development (11/13), mentoring (7/13), informally caring for others (5/13), and introducing developmentally intentional teaming protocols (13/13)). The teachers spoke about increased feelings of empowerment, both internally (i.e., feeling confident and/or valued (13/13), and externally (speaking up in ways that “prompted change” (10/13)). The administrators corroborated all of these claims. Last, the DILI completers reported reduced stress (10/13), in spite of assuming additional responsibilities.

In the next chapter, I summarize my study and research findings by reviewing the participants and their experiences. I then summarize my interview findings (the survey findings provided context of the research site and are discussed in Chapter V). I conclude by discussing conclusions, implications, and recommendations for future studies on teacher leadership.
CHAPTER IX: DISCUSSION AND IMPLICATIONS

“To whom much was given, much will be expected.” LUKE 12:48 (EHV)

In this chapter, I first revisit my rationale for my research, and consider the changing landscape of 21st century education including the adaptive, mixed, and technical challenges facing schools, and the need for teacher leadership to assist with meeting these demands. I then summarize the three clusters of findings (i.e., how the DILI served as a holding environment, how learning about adult development led to perspective shifts, and how participants transferred learning to their practice) that I presented in detail in Chapters VI-VIII. I discuss my conclusions, and the implications of those conclusions for education leadership practitioners and researchers. I review the major limitations of my study. I conclude by presenting a model for supporting the development of teacher leadership and close this chapter with suggestions for future study.

Revisiting the Purpose and Participants of this Study

In this section, I review the purpose and goals, research questions, and the sample of my study, each of which are more fully explored in Chapter I.

Purpose and Goals

Researchers, practitioners, and policy makers agree that recent policy changes (Santos et al., 2012) and a nation of changing demographics (Horsford & Sampson, 2013; Hussar et al., 2020) present a myriad of challenges that are too complex for a single leader (Boyce & Bowers, 2018). These challenges – which are adaptive, mixed, and technical in nature (Drago-Severson, 2004a, 2009, 2012a, 2016a; Drago-Severson & Blum-DeStefano 2018c, 2019, 2020; Linsky & Lawrence, 2011; Wagner et al., 2006) – call for a change in culture and for a shift in beliefs
Teacher leaders can be an important mechanism for supporting this change in culture, given the right support and opportunity (Drago-Severson & Blum-DeStefano, 2018c). This requires professional development that yields new capacities needed for leadership as teachers are asked to assume greater responsibilities and a larger role in supporting the needs of schools today (Drago-Severson & Blum-DeStefano, 2020; Drago-Severson, Blum-DeStefano, & Asghar, 2013). Yet, there remains a noticeable lack of recognition and opportunities for teachers to receive professional development that will develop their leadership capacity (Wenner & Campbell, 2017). Addressing these challenges requires a shift in school culture. These changes include transforming schools to become more collaborative and to provide teachers with the opportunity to engage in continuous professional learning – both of which can be addressed by learning about adult development.

Learning about adult development while simultaneously experiencing a developmentally intentional approach can support teacher leadership development in being better equipped to lead their peers and manage the demands of 21st century education (Drago-Severson & Blum-DeStefano, 2018a, 2020; Leithwood et al., 2010; Neumeriski, 2012; Wenner & Campbell, 2017; York-Barr & Duke, 2004). This notion of providing support to teachers and schools to be able to better manage the workload and changes of education today is important for the profession, as scholars, journalists, and researchers continue to argue that the demands on and lack of proper preparation for teachers is taking its toll on the profession – as evidenced with an exodus of teachers leaving the profession, and a drought of new teachers filling the pipeline (Ingersoll et al., 2017; Saunders, 2018; Sutcher et al., 2016).

This complex background of the current state of American education is the context for my study. My study was premised first on the idea that if teachers are being asked to assume
greater leadership responsibility, they should receive training to support them in doing so. Second, their voices should contribute to a wider understanding of the challenges and supports teachers need as they assume leadership. My research synthesizes learnings from 13 teachers who completed a three-year *developmentally intentional leadership institute* (DILI) to learn how, if at all, that institute helped them develop and apply leadership skills as they continued in their primary roles as teachers. I also interviewed the principals and district level leaders as well as the three teachers who did not complete the DILI.

This longitudinal program was *intentionally* designed to promote participants’ ability to handle the demands of leadership so that they might be better equipped to assume the additional responsibilities of teacher leadership. In order to do so, the DILI involved learning about developmental diversity. Specifically, they learned about Drago-Severson’s (2004a, 2009, 2012a, 2016a) ways of knowing (i.e., the developmental lenses they use to construct their understanding of the world around them), how to support their own and others’ development, how to apply developmental approaches to teaming (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018), a developmental approach to giving and receiving feedback, how to engage in difficult conversations from a developmental perspective, and – in its third year – how to assume increased leadership roles (Drago-Severson, 2007 2009, 2012a, 2016a).

Thus, the overarching goals of my study were to learn from informal teacher leaders and administrators in order to understand how, if at all, this district-sponsored longitudinal DILI, which is based on Drago-Severson’s (2004a, 2007, 2009, 2012a, 2016a) Learning-Oriented Leadership model and best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) supported the development of teacher leaders.
Research Questions

This dissertation study was built around four research questions.

1. How do 13 teacher leaders who took part in a developmentally intentional leadership institute (DILI) describe and understand the leadership responsibilities they assumed, if any? What challenges, if any, do they report facing as they developed their leadership practice?

2. How do 13 teacher leader participants describe and understand their learnings from the DILI, if any? What learnings, if any, do they report as being particularly useful as they took up leadership responsibilities?

3. What do teachers in the district (i.e., both those who have participated in the DILI and those who have not) name as their most significant work-related “challenges,” both in general and particularly around managing workload, collaboration, and teaming?

4. How do six school and district administrators (who directly supervise the 16 teacher participants) describe and understand the influence of the three-year DILI on the formal and informal leadership practices of the teacher participants?

Next, I provide a review of the selection criterion I used to identify the research site and the participants whom I learned from in this study.

Research Site

I used three selection criteria to identify a site for my study, as fully explained in Chapter I.

- A small school district (i.e., defined as less than 1,000 students; Boser, 2013).
- A school district with a multi-year, sustained, leadership development program for teachers based on both a Learning-Oriented Leadership model (Drago-Severson, 2004a,

- A program that included both teachers and administrators.

The only district I could identify that provided sustained leadership development for potential teacher leaders based on Learning-Oriented Leadership and that included administrators was the MELC school district, where I work as a curriculum supervisor and serve as the lead facilitator of their DILI. I discuss this in the Positionality section of Chapter I, in Chapter 3, and the Limitation section, below.

**Study Participants**

The DILI consisted of an initial cohort of 16 teachers and 6 administrators. Thus, there were three groups of participants in the DILI, all of whom participated in my study.

- 13 teacher leader participants who completed the DILI (Completers).
- 3 teacher participants, who voluntarily dropped out of the DILI after the first or second year (Non-Completers).
- 6 administrators, who directly supervised the participants and participated in the DILI alongside them.

The three non-completers were able to provide valuable insight, as they described their learnings. However, unlike their peers who completed the DILI, they did not report assuming additional leadership responsibilities. (See Chapter III for a fuller description of the member of each participant sub-group.)
Summary of Findings

In this section, I summarize the findings from Chapters VI-VIII, which arose in response to my first, second, and fourth research questions. I also provide a synthesis of my findings. I do not include findings from Chapter V in this review (research question #3) because I used the survey only to better understand the context of the research site, rather than to develop findings (see Limitations, below). My analysis of the interview data revealed findings in three clusters.

- The DILI served as a holding environment for the teacher leader participants and they extended this supportive environment beyond the DILI.
- Learning about adult development and developmental diversity through the lens of Learning-Oriented Leadership changed many perspectives held by the DILI completers.
- The DILI completers transferred their learning from the DILI to their practices in their schools, notably in support of augmented teacher leadership.

Holding Environment Findings

The DILI served as a *holding environment* in that it provided developmentally appropriate support, developmentally appropriate challenges, and stayed in place as the participants learned and grew (Kegan, 1994, 2000; Winnicott, 1965). The curriculum of the DILI was largely based on Drago-Severson’s (2004b, 2009, 2012a, 2016a, 2018a) Learning Oriented Leadership model, which posits that a holding environment is an important impetus for learning and leadership development. In fact, participants recognized how this approach nurtured their own leadership development in the DILI. They then sought to recreate a holding environment for their teams, mentees, and others as they assumed acts of leadership. This cluster of findings came in response to my first and second research questions.
The DILI offered many kinds of supports to its participants. Because of the developmental diversity in nearly any group of adults that which feels supportive to some can feel challenging to others (Drago-Severson, 2004b, 2009, 2012a, 2016a). The participants’ most cited supportive elements of the DILI included a cohort-based learning model (Drago-Severson, 2004b) and the “deliberate” structure for each meeting and the entire program. The participants frequently spoke of “tools” that they learned in the DILI that supported them in understanding those who were different from them (e.g., ways of knowing, teaming protocols (Drago-Severson, 2009, 2012a).

The DILI also offered many kinds of challenges for its participants. I define a challenge as something that is difficult. I also define the challenges that were incorporated into the DILI curricula as developmental challenges, or something that is beyond one’s capacity to do (Drago-Severson, 2004a, 2009, 2012a, 2016a). The first year’s challenges focused on self-awareness, including pushing participants to reflect and challenge their own assumptions. The second year’s challenges focused on teaming, including having critical conversations (i.e., taking a stand for your beliefs even when what you have to say might not be popular or well received). The third year’s challenges focused on assuming a leadership role in their schools, including a choice of leading professional development or any initiative of their interest.

The third element of serving as holding environment was that the DILI stayed in place over time, even as the participants learned and grew. The DILI was a three-year program.

**Perspective Change Findings**

The DILI-completing participants reported three major perspective shifts, or changes in beliefs that resulted from their work in the DILI. This finding emerged as the participants spoke of the ways they started to change their views about adult development, collaboration, and their
definition of leadership. This cluster of findings came in response my first two research questions.

First, these participants reported changing the way they viewed themselves and other adults. Learning about adult development (i.e., Drago-Severson’s 2004a, 2007, 2009, 2012a, 2016a), ways of knowing, and developmental diversity helped them to grow in self-awareness and to understand themselves in new ways, particularly as they came to see themselves and others as capable of learning and growing. For example, they began to view differences with others through a lens of developmental diversity, which helped them to be better able to collaborate with their colleagues.

Second, the DILI completers grew to see collaboration as a supportive part of their work, rather than the barrier that it had been previously. By learning new “tools” and skills (e.g., developmental teaming protocols such as norms; Drago-Severson, 2009) they were able to experience collaboration as an effective way to share their workload while simultaneously supporting the growth of other adults on their teams. They came to see differences in their teams – developmental or otherwise – as strengths that could lead to more effectively sharing tasks, solving problems, and even as opportunities to learn from one another.

Third, the participants reconceived leadership, itself, and ultimately came to see themselves as leaders. Previously, they defined leadership as a formal role or title, requiring a level of perfection that they knew they did not have. As they learned about Learning Oriented Leadership, they came to see leadership as a role that supports others. This – combined with their other work – allowed them to see themselves as leaders.
Transfer Findings

The participants in this study reported three ways that they transferred their learnings from the DILI to their practice as teacher leaders. By “transfer,” I mean that they independently applied the lessons from the DILI in their respective schools. Not only did the DILI-completing teachers report this, but their supervisors confirmed that they observed this themselves. Furthermore, the survey revealed that there was a statistically significant difference for the 13 teachers who participated in the DILI and those who did not in respect to their work (or transfer of learnings) on their grade level teams. To me, this is the most notable set of findings in my study.

First, the participants assumed new leadership responsibilities, including leading professional development, introducing developmentally intentional teaming protocols (Drago-Severson, 2009), mentoring (Drago-Severson, 2009) fellow teachers, and informally caring for their colleagues. This is especially notable because the concept and practice of teacher leadership was new for the MELC school district. The administrators reported in their interviews that these contributions were “supportive” for other staff members, led to increased “productivity” and collaboration, and helped lift the level of “professionalism” across the district.

Second, the DILI completers reported feeling and acting more empowered than they did prior to their participation in the DILI. Specifically, they described gains in confidence and/or increased feelings of being valued by others in their school communities. As they started to feel more valued, they “found” their voices and began to speak up in new ways. This required them to overcome fears of what others would think as they took stances for what they believed in – allowing them to express their feelings, and engage in critical conversations with others.
Third, a majority of the DILI completers reported *reduced feelings of stress*. They attributed this to learning a new set of “tools” that helped them to better understand themselves and others, to express themselves, and to facilitate effective collaboration. Quite surprisingly, despite the fact that the DILI completers had assumed greater responsibilities, these teacher leaders shared that they felt “better equipped” to manage their increased workloads than they had previously, and also reported reduced feelings of stress.

**Synthesis of Findings**

While above I summarized the findings as separate claims, in reality they were all intermingled and tied together. One could view them as the first cluster of findings (i.e. the holding environment) leading to the second cluster (i.e., perspective shifts), which in turn led to the third cluster (i.e., transfer of learnings and assumption of leadership responsibilities). However, as shown in Figure 15, this was not linear. Instead, it circled back a little bit, even as participants progressed.
As Figure 15 shows, first, the participants experienced the holding environment of the DILI as they learned. They then sought to extend that same feeling of support and comradery to others and gradually developed “tools” to be able to do so. Second, as they learned, they also shifted their perspectives to see themselves as leaders who could influence change and who could play a role in supporting others. As they changed their views of themselves and others, they sought to create a holding environment for those in their care – relying upon the tools and strategies they learned in the DILI to assume greater acts of leadership. These acts of leadership included relatively smaller acts (e.g., informal check ins) and larger acts (e.g., introducing and administering teaming protocols, mentoring others, leading professional development, and
speaking up). The findings revealed that the holding environment modeled for them how to support others, created a safe space for them to change perspective, and this in turn all led to the assumption of leadership roles, thus highlighting how all three findings are interconnected.

Next, I describe the conclusions, implications, and recommendations of my study.

**Conclusions, Implications, and Recommendations**

The findings of my study have led me to four conclusions. In this section, I discuss those conclusions, in light of the literature and present the implications and recommendations that follow from them. In Table 24 I summarize these conclusions, implications and recommendations before offering a fuller discussion. I save my implications for future research for the next section of this chapter.

**Table 24**

*Summary of Conclusions, Implications, and Primary Recommendations*

<table>
<thead>
<tr>
<th>Conclusion</th>
<th>Implications</th>
<th>Primary Recommendations</th>
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| Teacher leadership can be fostered so that it *transfers* into schools.  (see Chapter VIII) | Teacher leadership programs do not have to suffer the problem of teachers struggling to overcome cultural and other barriers to enacting teacher leadership. A synthesis of Darling-Hammond’s (2017) best practices in professional development principles, and content from Drago-Severson’s (2004a, 2009, 2012a, 2016a) Learning-Oriented Leadership, combined with a job-embedded approach Every Student Succeeds Act, 2015 and active administrator participation can result in in *transfer* teacher leadership from professional development to practice. | District-based leadership development programs should:  
  • Use Darling-Hammond et al. (2017) principles of effective PD (e.g., “sustained duration”)  
  • Use Drago-Severson’s Learning-Oriented Leadership to incorporate learning theory into PD programs.  
  • Include school leaders  
  • Use a job-embedded approach.  
*Senior* district leaders should ensure adequate resources, support cultural changes and lend highly visible support. |
| School districts can use teacher leadership to shift | This model of teacher leadership development provides an effective model of collaboration | District-based leadership development programs should: |
that teacher leaders can bring back to their schools to help build collaborative practices and shift culture. This can address widespread calls for increased collaboration (Drago-Severson, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Markow & Pieters, 2010; Ronfeldt et al., 2015; Wagner et al., 2006), and provide a way to face traditional egalitarian norms – that can be barriers to collaborative school culture (Katzenmoyer & Moller, 2009) – and to respond to increasing demands on schools (Santos et al., 2012).

- Include a major focus on collaboration, providing both experiences and explicit lessons.
- Create and model a holding environment for participants.

Master schedules and school calendars should support collaboration, both on the team- and school-level.

Leadership development programs that attend to developmental diversity (Kegan 1984, 2000) can support adults across a range of developmental systems. Utilizing Drago-Severson’s (2004a, 2009, 2012a, 2016a) Learning-Oriented Leadership as a curriculum and guide to support developmental diversity provides developmentally intentional support. Participants learn developmentally appropriate tools, protocols, and coping strategies required to meet the demands of teacher leadership and can produce powerful results.

- District-based leadership development programs should:
  - Recognize particular developmentally challenging aspects of leadership them for participants with developmental diversity.
  - Include time for participants to experience and practice new skills before having to apply learnings in their schools.
  - Provide an environment that offers appropriate support as they challenge participants, and do so longitudinally.

Schools can support a capacity for leadership with developmentally intentional professional development.

(see Chapter VI)

Fostering collaboration and comradery in schools has powerful implications for teacher retention and job satisfaction. Stress is a major problem among educators (Wixom, 2016), while loneliness in the workplace and burnout are correlated (Seppala & King, 2017). A sustained and developmental approach to teacher leadership development can create a professionally supportive comradery within their cohort that teacher leaders bring back to their schools and extend to their colleagues. This sense of efficacy and camaraderie makes teacher leadership sustainable in a way that the long-standing paradigm of teachers working in isolation does not (Darling-Hammond & Richardson, 2009).

- District-based leadership development programs should:
  - View teacher leadership development as a strategy to address teacher turnover and/or other signs of stress among their faculties.
  - Consider the potential cost savings of reducing teacher turnover when weighing the cost of high-quality teacher leadership development programs.
  - Incorporate team building and cohort structures to create communities and comradery within PD programs and, eventually within the cultural of their schools.
In next sections I discuss in-depth what I have highlighted in Table 24. First, I discuss how teacher leadership can be fostered such that that it has an influence in schools in the changed actions and behavior of teachers – through professional development that is high quality and developmentally intentional. Second, I address how teacher leadership can be an engine for shifting school culture towards collaboration, thus providing support for managing the challenges of education today. That is, teacher leaders can play an important role in shifting traditionally isolated school cultures to become more collaborative. Third, I explain how developmentally intentional professional development supports leadership capacity building. Fourth, I point out that teacher leadership is sustainable, because it helps teachers to lower their stress despite a greater workload (i.e., additional and new leadership responsibilities).

Fostering Teacher Leadership So That It Appears in Schools

The first conclusion of my study – and perhaps the conclusion closest to my heart – is that fostering teacher leadership in schools is possible. In other words, despite the considerable barriers to teacher leadership – particularly with teachers transferring their learning to actions of leadership (Ado, 2016; Silva et al., 2000; Snoek & Volman, 2014) – school districts can overcome these obstacles. They can use a synthesis of best practices in professional development (Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015) and leadership development. Specifically, Darling-Hammond’s (2017) best practices in professional development and developmental principles and practices that compose Drago-Severson’s (2004a, 2007, 2009, 2012a, 2012b, 2016a) Learning-Oriented Leadership model. In addition, active administrator participation and a job-embedded component (Every Student Succeeds Act, 2015) is important in bringing teacher leadership to schools.
The barriers to teacher leadership are well documented in the literature. There is no single common understanding of teacher leadership (Margolis & Huggins, 2012; Neumeriski, 2012; Wenner & Campbell, 2017; York-Barr & Duke, 2004) and the roles and responsibilities of teacher leaders vary. The culture of egalitarian norms that exist in schools and the cultures that hold traditional concepts of seniority and working in isolation thwart potential teacher leaders’ ability to execute leadership (Durias, 2010; Friedman, 2011; Johnson & Donaldson, 2007; Sinha & Hanuscin, 2017; Taylor et al., 2011; Weiner & Woulfin, 2018; Wenner & Campbell, 2017; York-Barr & Duke, 2004). School administrators can be gatekeepers that inhibit teacher leaders (Bryant, 2017; Coughlin, 2015; Mason, 2016; Muijs & Harris, 2007; Szeto & Cheng, 2018; Silva et al., 2000; Sinha & Hanuscin, 2017; Taylor et al., 2011; Trick & Browne-Ferrigno, 2016; Weiner & Woulfin, 2018). Adding responsibilities to already busy teachers often appears difficult (Muijs & Harris, 2006; Patterson & Manning, 2010; Wenner & Campbell, 2017). The demands of leadership (i.e., an ability to stand up for what one believes in, engage in critical conversations, learn how to set boundaries, and balance responsibilities) present a developmental demand that may not be within a teachers’ capacity to execute (Drago-Severson, 2012a, 2016a; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Drago-Severson & Blum-DeStefano, 2014; Kegan 1994, 2000).

My study shows that utilizing best practices in professional development (i.e., longitudinal, support of administrators, job-embedded, and collaborative; Darling-Hammond et al., 2017; Every Student Succeeds Act, 2015). In addition, it utilized Drago-Severson’s (2004a, 2007, 2009, 2012a, 2016a) Learning-Oriented Leadership to build capacity within teacher leader participants and to help the participants from all groups—teacher leaders, principals, and district level leaders—develop a language to support self and others’ development and practices to
implement on behalf of that. To be specific, the structure and curriculum based on the principles of Learning-Oriented Leadership (for both teachers and administrators) has shown that teacher leaders are able to overcome the barriers in the literature and assume acts of leadership.

Learning-Oriented Leadership’s focus on intentionally building developmental capacities while also providing informational learning (e.g., developmental teaming protocols, knowledge of the ways of knowing) is well suited to be connected to the principles of effective professional development. For example, Learning-Oriented Leadership’s holding environment – that stays in place – matches Darling-Hammond’s “sustained duration” (p. 15). Darling-Hammond’s “models and modelling” (p. 11) of effective practices matches Learning-Oriented Leadership’s focus on having (potential) leaders experience the practices that they should use in their leadership practice. In fact, Drago-Severson’s approach to leadership development (Drago-Severson, 2004a, 2007, 2009, 2012a, 2016a; Drago-Severson, Blum-DeStefano, & Asghar, 2013; Drago-Severson, Roy, & von Frank, 2015) seems to embody many principles of the effective professional development practices recommended by Darling-Hammond et al. (2017).

Furthermore, including administrators is critical (Calkins et al., 2019; Cooper et al., 2016; Phillips, 2018; Weiner & Woulfin, 2018). The support of the superintendent is of vital importance, as the superintendent has the authority to require that other administrators support teacher leadership, and can also allocate Title II funding to support professional development for teacher leadership. My study echoes long standing observations that principals are responsible for creating cultural conditions that allow teacher leadership to thrive (Cooper et al., 2016; Calkins et al., 2019; Phillips, 2018; Weiner & Woulfin, 2018), but they need training and time to do this (Bryant, 2017; Kerr, 2015; Snoek & Volman, 2014; Stand, 2018). To make this possible, school principals need support from their superintendents to take time from the immediately
pressing demands in their buildings to attend professional development. My study provides evidence that this effort is worth the principal’s time, as it contributes to producing desired changes – particularly to culture – in their schools. I discuss this further next.

**Recommendations for Districts**

- District-based leadership development programs should follow best practices in professional development including Darling-Hammond’s principles of effective professional development, particularly her last principle “sustained duration.”
- District-based leadership development programs should use Drago-Severson’s Learning-Oriented Leadership as an education-specific applied model of adult development.
- District-based leadership development programs should include school leaders so that they can learn about teacher leadership and take joint ownership of teacher leadership in their schools.
- District-based leadership development program should include experiential components in which participants see and feel the leadership practices being modeled for them.
- District-based leadership development program should be flexible enough to allow participants to craft their own entries into the practice of teacher leadership.

**Recommendation for District Leaders**

- Senior district leaders should ensure that district-based leadership development programs have adequate funding and resources.
- Senior district leaders should support necessary changes to school culture and practice (e.g., Master schedules and school calendars with built in time for collaboration).
- Senior district leaders should lend visible support to these programs (e.g., Attend professional development when possible).
Recommendations for Principals

- Principals should look for potential teacher leaders and encourage them to take on greater leadership responsibilities.
- Principals should devote resources (including their own time) to supporting teacher leadership in their schools.
- Principals should model the practices of leadership that they know their developing teacher leaders are learning.

Shifting School Culture Towards Collaboration

The second major conclusion of my study is that this approach to teacher leadership development can shift school cultures towards greater collaboration. The need for collaboration is clear, but resistance to changing culture is great (Heifetz & Linsky, 2017; Wagner et al., 2006). One of the greatest barriers to introducing cultures of collaboration in schools is overcoming longstanding traditional cultures in schools (Drago-Severson, 2012b; Drago-Severson & Blum DeStefano, 2020) including egalitarian norms (Katzenmoyer & Moller, 2009; Wagner et al., 2006).

Schools must shift towards a culture of collaboration (Drago-Severson, 2016a; Drago-Severson & Blum-DeStefano, 2020; Drago-Severson, O’Connor, & Blum-DeStefano, 2018; Markow & Pieters, 2010; Ronfeldt et al., 2015; Wagner et al., 2006). In order to better address some of the most pressing demands of education today, schools need to replace isolated and egalitarian cultures with new models of learning and collaboration (Katzenmoyer & Moller, 2009). This includes newer standards, distance learning during a global pandemic, and addressing racial inequities. For example, the demand of new standards, include the integration of literacy into the content areas to prepare all students for college and career readiness.
standards (Santos et al., 2012) requires collaboration between subject area teachers. This, in turn, has required teachers to develop new pedagogical skills and master new models of learning and planning across subject areas in schools. Teacher leaders play a critical role in fostering this type of shared learning (Darling-Hammond & Richardson, 2009; Darling-Hammond et al., 2017; DeMonte, 2013; Ronfeldt et al., 2015; Santos et al., 2012; Wagner et al., 2006). Collaboration is increasingly important in meeting other demands too. Student demographics are shifting to become more diverse including greater students with limited English proficiency who do not speak English as a first language (Horsford & Sampson, 2013; Hussar et al., 2020) and an increased number of students who receive special education services (Snyder et al., 2019).

Effective collaboration between educators allows teachers to engage in dialogue about equity, change, and best practices as they share effective strategies for addressing the varied needs of students (MacDonald, 2011).

My study shows that participating in the DILI—according to what the teacher leader participants and the administrator participants shared and even further substantiated by the district survey I administered—produced real changes to the MELC School District’s culture towards greater collaboration between teachers. The DILI modeled a culture of collaboration for participants that they transferred to their respective schools. The cohort produced a team experience as participants were explicitly taught “tools” while simultaneously experiencing developmentally intentional teaming protocols (Drago-Severson, 2004a, 2009, 2012a, 2016a) and models of effective collaboration—including norms, check ins, agendas, teaming surveys, and time for celebration.

Having experienced effective collaboration, the teacher leader participants in this study explained that they wanted to recreate this professionally-based supportive comradery for others.
Both the teachers and administrators alike spoke of how team meetings became more collaborative, productive, and effective. In addition, the survey highlighted a statistically significant difference between teachers who participated in the DILI and those who did not in their views of their teams. Teaching potential teacher leaders to foster collaboration in supportive, professionally-oriented ways resulted in these participants bringing this professionally-based personal comradery to their teams and their schools.

My study suggests that teachers can benefit from being taught how to collaborate—especially from a developmental perspective. It also shows that doing so can support teacher leaders—and principals and district leaders—in helping to shift schools’ cultures towards more meaningful collaboration.

**Recommendations for Districts**

- District-based leadership development programs should include a major focus on collaboration, providing both experiences and explicit lessons such as modelling developmental protocols and strategies. (As Drago-Severson’s model suggests.) For example, it is important to create time, space, and structures for collaboration—such as building “living norms,” using “developmental tools” that can assist teams in collaboratively evaluating and talking together about their teams’ effectiveness (Drago-Severson, 2009, 2012a, 2016a). These are developmental tools, protocols, and practices I employed from the Learning-Oriented Leadership model that supported the teacher leaders’ and the administrators’ capacities to improve collaboration and teaming, as they explained.
District-based leadership development programs should model a holding environment, so that participating teachers can replicate that for others (e.g., create structures to create communities).

**Recommendations for Principals**

- Master schedules and school calendars should support collaboration through common planning time and built in release time, both to review student data and to collaborate on planning (e.g., weekly team time, faculty meetings dedicated to student data reviews).
- Principals should actively encourage use of teaming protocols by the teams within their schools, including modelling teaming protocols in their own meetings (e.g., setting norms).

**Recommendations for Leadership Preparation Programs**

- Administrative and teacher preparation programs should include learning about adult development and Learning-Oriented Leadership (i.e., the pillar practices) so that they can learn how to better collaborate and sustain teacher leadership.

**Developmentally Intentional Professional Development Supports Leadership Capacity Building**

The third conclusion of my study is that developmentally intentional professional development supports leadership capacity building. Leadership development programs which use an array of practices that are part of the Learning-Oriented Leadership model (Drago-Severson, 2004a, 2009, 2012a, 2016a, 2020) that support adults across a range of developmental systems can produce outstanding results. Doing so may even produce transformational growth in its participants. This study only hints at that latter point and I discuss this more fully below.
Drago-Severson (2004a, 2009, 2012a, 2016a) describes four primarily different meaning making systems in adulthood, which she calls the ways of knowing. Each way of knowing has strengths, limitations, and different needs. While no way of knowing is necessarily better than any other, leadership often calls for capacities that only appear for those approaching Drago-Severson’s (2009, 2012a, 2016a) the third more common system in adulthood (i.e. self-authoring). And yet, perhaps as much as 58% of the adults do not (yet) have these capacities (Kegan & Wilber 2013; Kegan, 1982, 1994, 2000; Kegan & Lahey, 2016). Since there will be developmental diversity—people with a variety of different ways of knowing—in a single group (Drago-Severson, 2004a, 2009, 2012a, 2016a; Kegan & Lahey, 2016), professional development needs to include a variety of approaches to accommodate learners with different developmental orientations (Drago-Severson, 2009, 2012a, 2016a).

My study shows that districts can build on Drago-Severson’s work by attending to developmental diversity with developmentally intentional leadership programs. The participants in this program—the DILI—described it as so challenging that it “pushed them outside of their comfort zone,” and yet the teachers who completed it (13/16) were remarkably enthusiastic about it. The participants stuck with this professional development – calling it “comfortable,” in spite of being pushed out of their comfort zones – and pointed to their “enjoy[ment] of the camaraderie.”

The developmentally intentional practices in this program included providing choice, time to collaborate, planning time, and coaching that was tailored for different audiences (see Appendix G for a full list of the developmentally intentional design aspects of this DILI). Participants learned developmentally appropriate tools, protocols, and coping strategies while being given developmentally appropriate supports – none more important than the holding
of the DILI program. For example, the DILI grew their ability to address developmental skills that are associated with managing peer resistance because of egalitarian norms (e.g., learning how to take a stance when it might be unpopular, engaging in critical conversations, holding peers accountable, and addressing fears of conflict).

While the curriculum of this DILI was based largely on Drago-Severson’s Learning-Oriented Leadership, its pedagogy was based – more than anything else – on attending to the developmental diversity of the participants, which itself is a principle of Learning-Oriented Leadership. This study did not collect data about participants’ ways of knowing or measures of their developmental growth by administering developmental assessments such as the subject object interview assessments (Lahey, Felix et al., 2011; Lahey, Souvaine et al., 1988). Therefore, claiming developmental growth is beyond the scope of this study. However, the participants’ descriptions of learning to say, “No,” speaking up (i.e., including to their principals), managing a varied workload, overcoming fear of conflict, leading professional development, and seeing themselves as leaders are notable. In other words, I believe that my study suggests that there may have been developmental growth towards a self-authoring way of knowing by many participants. I believe a number of these teachers showed the kinds of transformational growth that will enable them to better manage the challenges of leadership, though I cannot be certain without that kind of data.

**Recommendations for Districts**

- District-based leadership development programs should recognize particular developmentally challenging aspects of leadership and design their programs to develop
skills (e.g., taking an unpopular stance) in a way that addresses the developmental diversity of participants.

- District-based leadership development programs should incorporate both reflection and collaboration to provide time to challenge assumptions and learn from colleagues.
- District-based leadership development programs should include time for participants to experience and practice new skills before having to apply learnings in their schools (e.g., having an opportunity to plan and role play critical conversations with colleagues (Drago-Severson, O’Connor, & Blum-DeStefano, 2018).
- District-based leadership development programs should utilize developmental intentionality to create a learning environment that is sustained and provides both challenges and supports to participants in order to provide a holding environment that may support developmental growth (Drago-Severson, 2009).

**Teacher Leadership is Sustainable: Lower Stress Despite Increased Workload**

The last conclusion of my study is that teacher leadership is sustainable because it can actually reduce stress for teachers and increase their ability to manage a greater workload.

Stress is a major problem among educators. Loneliness and burnout have a negative correlation in the work place (Seppala & King, 2017) and 44% percent of new teachers quit after five years (Ingersoll et al., 2017). Teachers who leave the profession cite lack of administrative support, lack of collegial opportunities, and lack of teacher input into decision making as top rationales for quitting, with the largest factor being increased measures of accountability. All of these contribute to amazing levels of stress (Sutcher et al., 2016).

The long-standing paradigm and school culture of teachers working in isolation does not work to meet the demands of teaching today (Darling-Hammond & Richardson, 2009; Darling-
Hammond et al., 2017) and contributes to the stress of teachers. Feelings of stress, exhaustion, and burnout are not just about workload, they are also about loneliness (Brown, 2018; Seppala & King, 2017). This loneliness has a profound impact on individuals and organizations. The human brain interprets feelings of loneliness the same as physical pain, and releases stress-related hormones and neurotransmitters resulting in negative health consequences (Campagne, 2019). In the workplace this translates to reduced productivity. However, when the workplace has elements of social support there are greater feelings of social connectedness, feelings of value, support, and respect which leads to gains in productivity (Seppala & King, 2017).

Not only does it follow from the literature that this kind of program might reduce teachers’ stress, participants explicitly reported that it happened. This study shows that teacher leadership does not have to contribute to that stress, burnout, or turnover. This developmental approach to leadership created feelings of efficacy and comradery in a way that makes teacher leadership sustainable. The participants in my study created professionally supportive comradery within their cohort, and extended it as they brought that back to their buildings across the district. Furthermore, fostering collaboration and comradery in schools has powerful implications for teacher retention and job satisfaction (Berry et al., 2009).

**Recommendations for Districts**

- School districts should consider teacher leadership development as a strategy to address teacher turnover and/or other signs of stress among their faculties.
- School districts should consider the potential cost savings of reduced teacher turnover when considering the cost of high-quality teacher leadership development programs.
- District-based professional development programs – be they aimed towards teacher leadership, or not—should incorporate team building and cohort structures to create
communities and comradery within the structure of the school and within professional
development (e.g., celebrations, new teacher cohorts).

In this section I expanded my findings and discussed their implications and my
recommendations for practitioners and researchers who seek to support schools, administrators,
teachers, and students with teacher leadership and professional development. Next, I describe
suggestions for future research.

**Implications for Future Research**

I believe that my study suggests three areas that merit future investigation.

- Developmental growth in DILI participants (e.g. pre-and post-assessments to measure
growth).
- Influence of teacher leaders on other teachers.
- Use of newfound voices.

**Does This Kind of Intervention Produce Developmental Growth?**

This DILI was designed to provide developmentally intentional support, which might
have the potential to foster *transformational* learning. It explicitly scaffolded skills that are
typically exhibited by people who have a *self-authoring* way of knowing (Drago-Severson,
2004a, 2009, 2012a, 2016a; Kegan, 1994, 2000). For example, taking a stance for one’s beliefs
and engaging in critical conversations. However, measuring any increases in ones’
developmental capacities—for example conducting developmental assessments (Lahey, Felix et
al., 2011; Lahey, Souvaine et al., 1988) before and after the program—of the participants was
beyond the scope of this study.
The teachers’ stories of their journey of teacher leadership were suggestive of developmental growth. For example, Joan spoke of how her learnings in the DILI influenced her parenting.

In a nutshell, it's made me a better mom because I'm not too worried about what other people think. For example, when my six-year-old is acting like a jerk in public. In the past, I would have been more likely to reprimand him in a way to show other people that I don't find this behavior acceptable – when in reality I know that he doesn't respond well to that. And it's not going to teach him anything. And so, even if it looks like I'm not addressing the situation strongly enough, doesn't matter. The only thing that really matters is what I need to do for him.

Joan described how she was newly able to recognize that what others thought of her parenting “doesn’t matter.” This could possibly suggest developmental growth from a socializing perspective toward more of a self-authoring one. The 34 hours of interview data I collected include many stories like this.

I recommend that future researchers investigate whether this kind of developmentally intentional program does, in fact, produce developmental growth. This would require them to conduct formal subject-object interviews (Lahey, Felix et al., 2011; Lahey, Souvaine et al., 1988) before the program began and after it completed.

**Does this Kind of Teacher Leadership Influence Other Teachers in the District?**

Throughout this study, the DILI completers spoke of their acts of teacher leadership (i.e., leading professional development, finding their voice and speaking up, leading their teams and introducing developmental protocols, mentoring others, and informally supporting the development of others). The principals and the district administrators also spoke of these acts of leadership and how it benefited them in executing their vision of the district. For example, Lynda spoke of a “ripple effect,” as the teacher leaders’ work spread to others. Nicholas spoke of the teachers’ actions as “raising the bar.” Francis spoke of how it “dovetailed” with his efforts to get
leadership built up within the building.” However, the voice that is absent in this study is that of the other teachers who work in the MELC school district, but did not participate in the DILI. The non-participants or teachers who did not participate in the DILI are the teachers who observed and experienced the DILI completers’ leadership.

I recommend that future researchers investigate how those other teachers experience this kind of leadership from their peers. This could include self-reports from those other teachers, be they on the same teams as the teacher leaders, or simply colleagues in the same schools. This could include qualitative interview studies with those teachers, observational studies, or even survey-based studies about team dynamics and school cultures.

**How Do Teacher Leaders Use Their Voice?**

My study revealed that almost all of the participants reported that they “found their voice.” They became able to take a stand for what they believed in and shared their ideas with others. For example, Elizabeth told a story of holding a colleague accountable for learning how to conduct assessments for her own students. Gabriella shared how she spoke to a colleague about his decision not to teach the curriculum, including how it impacted her students the following year, and Fatima started to share her ideas in team meetings. When teachers speak up they change the culture of schools (MacDonald, 2011). This can be a very powerful act. However, my study did not focus on the particulars of these acts, as much as the fact that they happened. I did not systemically examine the conditions or circumstances in which they spoke up, or of those when they still remained quiet. I did not ask them about the issues that they spoke up about, or those that they still felt were beyond their voices.

I recommend that future researcher investigate how those teachers leaders who newly find their voices use their voice. For example, a potential research question could be: to what degree
do program participants use their voices to advocate for their students, stronger learning communities, or even social justice?

Limitations

In this section, I acknowledge and describe the limitations present in this study. Of course, this qualitative case study presents findings that are only generalizable to this sample of participants—internal generalizability (Locke et al., 2014; Maxwell, 2013). Thus, my study cannot claim generalizability beyond this particular set of participants and research site, namely external generalizability. Interviews were the primary data collection method in this study. A second limitation of qualitative research is that there is “attitudinal fallacy or the error of inferring situated behavior from verbal accounts of sentiments and schema” that rely on methods that “privilege individual accounts” (Jerolmack & Khan, 2014, p. 201). In order to address this, I triangulated the data with secondary interviews and a survey. However, there were additional limitations particular to my study. The first three follow from my selection criteria.

- My relationship to the research.
- The demographics of the participants.
- The exclusive professional development opportunity in this district

The last limitation particular to this study was a result of my own instrument design.

- Shortcomings in the survey design.

My Relationship to the Research

My primary goal for this study was to examine how teachers’ experiences in what I thought would be a high-quality, district-run teacher leadership development program, in the kind of district that I know best. That led to my fairly straightforward selection criteria. High
quality professional learning meant using best practices in professional development (Darling-Hammond et al., 2017). High quality leadership learning also meant that it utilized Learning-Oriented Leadership (Drago-Severson, 2004a, 2009, 2012a, 2016a) as a curriculum and pedagogy. Both scholars, Darling-Hammond and Drago-Severson call for longitudinal programs and both imply that administrator support is important. Finally, my experience in small school districts has led to the recognition that there are less formal leaders or coaches and administrators in small districts so I wanted to study teacher leadership in a small district. The only district I could identify that met all of these criteria was the MELC school district, where I work as a curriculum supervisor.

I served as both the researcher, and as the designer/lead facilitator of the DILI. As I discussed in Chapter III, I accepted a position in the MELC school district on the condition that I was allowed to facilitate a teacher leader institute that provided a developmentally intentional professional learning experience for administrators and teachers. I had previously studied adult development under Professor Drago-Severson, and sought to support the development of teacher leaders utilizing this work. As a doctoral student, she has served as my advisor and has met with the cohort twice per year. Furthermore, in addition to facilitating professional development and coaching teachers, I also perform evaluative observations of teachers in my district.

My dual role (i.e., in the district and as a researcher) presented reactivity issues. I discussed in Chapter III how I tried to address this, but I must acknowledge that this is the main limitation in my study. Participants might have shared their experiences differently if I was not a direct supervisor and the sponsor of this program. I hope that my relationship with the participants made them feel more comfortable in their sharing but I cannot be sure that is the case. However, I am confident that my knowledge of them helped me greatly in understanding
what they meant (i.e., interpretative validity) as I analyzed the interview transcripts. Overall I cannot ignore the advantages and disadvantages of my dual role including the possibility of reactivity issues that influenced the honesty of participants.

The Demographics of the Participants

Another limitation of my study stems from the nature of the cohort in this DILI. In fact, there is very limited demographic diversity in this group. The 13 participants who provided the primary source of data (i.e., the DILI completers) were all white and female. They did vary by age (i.e., 32-59) and length of experience (i.e., 5-25 years), but even this is limited. They may all be considered middle-aged, and there are no early-career teachers. The administrators varied more by gender, but less by age (i.e., 41-56) and experience (i.e., 15 to 30 years).

As discussed in Chapter I, I did not select the DILI participants. They volunteered and/or were chosen by the superintendent of the district. Therefore, I was not able to see a more diverse group, either as the facilitator of the DILI or as a researcher. The absence of the voices of people of color and paucity of male teachers (i.e., in the primary source of data) is an important limitation of this study, and it presents an opportunity for future studies.

The Exclusive Professional Learning Experience of the DILI

The third major limitation is that the participants in this study received exclusive professional development. The DILI provided professional learning for teacher leaders, which is itself a rare commodity (Wenner & Campbell, 2017). I intentionally sought to study a very high-quality program (see above), which is often atypical but currently growing in some places (Darling-Hammond & Richardson, 2009; Darling-Hammond et al., 2017; Kraft et al., 2018; Learning Forward & Education Counsel, 2017). Again, those selection criteria – as straightforward as they initially appeared to me – are not commonly met.
To illustrate this further, let me point to Dr. Drago-Severson’s role. These teachers were lucky enough to have her lead two sessions, each year. I do not imagine that many teachers get that opportunity. This program’s use of exercises that foster both informational and transformational learning (Drago-Severson, 2004a, 2009, 2012a, 2016a) is unusual. And while not as rare as access to Dr. Drago-Severson, it also included administrators—including the superintendent—who learned alongside their teachers which is quite atypical, even though its usefulness is well established (Bryant, 2017; Coughlin, 2015; Mason, 2016; Muijs & Harris, 2007; Szeto & Cheng, 2018; Silva et al., 2000; Sinha & Hanuscin, 2017; Taylor et al., 2011; Trick & Browne-Ferrigno, 2016; Weiner & Woulfin, 2018).

My recommendations and conclusions reference a developmental approach to teacher leadership that is sustained, job-embedded, collaborative, and supported by administrators who participate alongside their teachers. I acknowledge that my recommendations (see below) may appear to prescribe some hints of utopia of professional learning—but I do believe this is possible. My research shows the difference this kind of professional learning experience can make for teachers, principals and district leaders. I know that the program I examined is not typical. However, even if schools and districts can adopt pieces of it—they will reap the benefits.

**Shortcomings in the Survey Design**

As with any research study, there were flaws in the design and execution of this study. The survey design, it turned out, was flawed. I simply did not construct the language of the quantitative survey properly to match the anticipated language of the participants in their interviews. For example, the survey centers around the word *challenge* and asks participants to rank their greatest challenges. I presented the word *challenge* to the general population of teachers, who were not trained in the expert sense of the word that DILI participants learned.
That is, *challenge can refer to* Heifetz’s adaptive, technical and mixed challenges (2009) and to Drago-Severson’s developmental challenges (2004a, 2009, 2012a, 2016a). However, without knowing those meanings, teachers likely simply understood it to mean something difficult.

Therefore, I was limited in being able to make connections between the quantitative and qualitative data that I collected. Though I learned from the survey (see Chapter V), I was not able to include that data when building towards my findings other than acknowledging the statistically significant difference between the DILI participants and the teachers who did not participate in the training around the topic of teaming. This kept me from having a more integrated mixed method study that I had hoped for.

**The Importance of Teacher Leadership**

The field of education is changing as rapidly as the rest of the world. Those changes have resulted in significant challenges—i.e., technical, mixed, and adaptive (Heifetz, 2004; Heifetz & Linsky, 2017). These challenges call for teacher leadership as schools must meet the needs of a more diverse student population (Horsford & Sampson, 2013; Hussar et al., 2020; Snyder et al., 2019) and simultaneously address the demands of increased rigor, standards, and measures of accountability brought forth by recent laws and policies (Achieve, 2017). Most recently, teachers around the world faced the task of educating students during a global pandemic. Without any time for preparation or training, teachers were tasked with the challenge of learning how to educate students through distance learning (Bouffard, 2020). These technical, mixed, and adaptive challenges are on the rise, and addressing them calls for all members of a school to shift their thinking, problem solve, and collectively work together to find solutions (Heifetz, 2004; Heifetz & Linsky, 2017). Teacher leaders and administrators partnering together to lead schools is an optimal approach for meeting the demands of education and leadership (Boyce & Bowers,
2018). But the question remains, how do we bring teachers and administrators together to share leadership and how do we prepare teachers for leadership roles?

One possible answer is by investing in teacher leadership. Teachers need to be provided with high quality professional learning (i.e., job-embedded, longitudinal, developmental, and the inclusion of administrators). Ensuring that this professional development is high quality is critical, because teacher leadership takes time and requires support. Teacher leadership programs can sometimes fail to get teachers to assume leadership roles (i.e., transfer their learnings). Instead, programs produce only attitudinal changes, but not behavioral changes (Durias, 2010; Friedman, 2011; Johnson & Donaldson, 2007; Sinha & Hanuscin, 2017; Taylor et al., 2010; Weiner & Woulfin, 2018; Wenner & Campbell, 2017; York-Barr & Duke, 2004). For the teachers in this study, a job-embedded, longitudinal, developmental approach that was supported by their administrators proved critical to their assumption of leadership roles.

It is not just that teacher leadership is difficult – teaching, itself, is also difficult. Every teacher needs support to be successful and thrive. The teacher leaders in this study recognized that, and because they experienced high quality professional development and a holding environment they sought to recreate these conditions in their schools and extended the same experience to their colleagues. For example, they set norms, took team surveys, created agendas, turnkeyed research, celebrated each other’s’ successes, and used their knowledge of developmental diversity and the ways of knowing (Drago-Severson, 2004a, 2009, 2012a, 2016a) as a way to provide support for their peers. The teacher leaders and administrators alike proclaimed that team meetings and professional development sessions became more productive and meaningful.
While the investment of teacher leadership may appear extraordinary, the results actually are extraordinary. Teams of teachers who support other teachers by facilitating developmentally intentional team meetings, caring for others’ development, and sharing their knowledge by leading professional learning have the potential to shift the culture of a school and in turn the school can better meet the demands of education today.

A Final Thought

Teacher leadership is an investment. It is an investment of resources. It is an investment of time. Perhaps most challenging of all, it is a shift from traditional American school culture. Yes, this is a big investment. But the return is significant and can yield changes in professionalism, collaborative practices, productivity, caring for others, and an overall shift in culture that raises expectations.

This dissertation was finalized during the spring of 2020 as the world sheltered in place to mitigate the impact of a global pandemic. Without any notice at all schools transitioned to distance learning and our nation turned to our teachers for guidance, expertise, and leadership. As teachers adjusted to learn new programs, new technology, and balance their own familial needs, they relied on each other’s influence, expertise, and support—the exact definition of teacher leadership—to provide education and stability for their communities. In May the nation’s streets filled with protests and calls for social justice and reform to address racial inequities. Across the country teachers are being asked to lead this cause and to courageously share their voices, experiences, and expertise to make our schools more equitable and accessible for all. Again the leadership of our teachers is needed.

In this final note, I ask policy makers and district leaders to not just ask teachers to serve as leaders but to consider the support that teachers need to be leaders. By investing in even a
small group of teacher leaders it can then help “spread” collaborative practices, teacher voices, and collegial learning that will in turn build school communities where students and teachers alike can learn and lead — I ask you to try even one of these suggestions – setting norms, making time for collaboration, having celebrations to build community, Learning-Oriented Leadership, or administrators and teachers attending professional development together. And, more importantly, I ask that you remember that when we invest in our teachers, that investment multiples. It reaches other teachers, it reaches our administrators, and most importantly of all –it reaches our students.
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Appendix A: District Survey For the MELC Teaching Staff

Would you be willing to participate in a 10-minute survey?

For the following questions, please answer the open-ended questions and rate on a scale of 1 to 5 the level to which you feel you are managing/coping (1 = not at all managing/coping well, 3 = neutral, 5 = managing/coping very well/no trouble at all).

Demographic Questionnaire:

1. What is your role in the School District?
2. How long have you been an educator? (Years).
3. What is your race?
4. What is your gender?

Question 1: Challenges with Students

1) As a teacher what, if anything, is the greatest challenge you face when working with students?

________________________________________________________________

2) On a scale of 1-5 how do you feel you are managing this challenge?

1 2 3 4 5

3) What kind of support would be helpful in managing this challenge?

________________________________________________________________

Question 2: Challenges with Parents

1) As a teacher what, if anything, is the greatest challenge you face when working with parents?

________________________________________________________________

2) How do you feel you are managing/coping with this challenge?

1 2 3 4 5

3) What kind of support would be helpful in managing this challenge?

________________________________________________________________
Question 3: Challenges with colleagues

1) As a teacher what, if anything, is the greatest challenge you face when working with colleagues?

_____________________________________________________________________

2) On a scale of 1-10 how do you feel you are managing/coping with this challenge?

1 2 3 4 5

3) What kind of support would be helpful in managing this challenge?

_____________________________________________________________________

Question 4: Challenges with teams

1) As a teacher what, if anything, is the greatest challenge you face when working with your team?

_____________________________________________________________________

2) On a scale of 1-10 how do you feel you are managing/coping with this challenge?

1 2 3 4 5

3) What kind of support would be helpful in managing this challenge?

_____________________________________________________________________

Question 5: Challenges with the Curriculum

1) As a teacher what, if anything, is the greatest challenge you face when working with implementing the curriculum?

_____________________________________________________________________

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2) On a scale of 1-10 how do you feel you are managing/coping with this challenge?

1  2  3  4  5

3) What kind of support would be helpful in managing this challenge?

________________________________________

Question 6: Challenges Administrators

1) As a teacher what, if anything, is the greatest challenge you face when working with administrators?

________________________________________

2) On a scale of 1-10 how well do you feel you are managing with this challenge?

1  2  3  4  5

3) What kind of support would be helpful in managing this challenge?

________________________________________

Did you participate in the Teacher Leadership Cohort Training?

a. Yes

b. No

c. If (Yes) how many years did you participate for?
    1. One
    2. Two
    3. Three
Appendix B: DILI Completor Teacher Interview Protocol, Round #1

Name of Interviewee: ____________________________

Name of Interviewer: ____________________________

Date: ____________________________

Start Time of Interview: ___________ End time of Interview: ___________

Introduction to Interview: Context Setting (5 minutes)
My name is Marta and I will be interviewing you to learn about your experience as a teacher leader in the Teacher Leader Cohort. I know you worked with Christy over the last three years, and I feel honored to be interviewing you. In case helpful to know, I support nursing students in earning their doctorate. Christy hired me because she wants you to feel as comfortable as possible talking openly about your experience as a teacher leader and in the teacher leader cohort. I also want you to know that I have talked with Christy at great length to learn about the district, the teacher leadership cohort and your work, and we will continue to talk throughout the course of this process so if you have any questions feel free to let either of us know! As we go forward I will be speaking in the “I” voice during our interview to make it more personal.

1. Appreciation & Introduction
Thank you very much for agreeing to this interview. Also, thank you for signing and returning the consent form and for giving your permission to audio-record this interview. Can we please reconfirm if both of these are still okay? Do you have any questions about the consent form at this time?

2. Overview of Our Purpose and Goals
Before beginning, I want to remind you that the purpose of the interview is to learn about your experience in the Teacher Leader Cohort. I am interested in learning about your experience, the challenges you face as a teacher and, and how, if at all you have applied any learnings from the cohort in your practice as a teacher and teacher leader. There are no right or wrong answers; rather I will be talking with you to better understand your leadership experience. This interview will take about 60 minutes and we will follow up with a second, 60-minute interview. Thank you so very much, in advance, for your help and time.

3. Confidentiality
In any publications, Christy will disguise your name and honor confidentiality. I may quote things that you say but I’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer.

Would you like to select an alias or would you like me to select an alias? ____________________________

______
4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

Section 1: Teacher Leader Background and Context (5 minutes)

1) I’d like to start by learning a little about you—if that’s ok? How many years have you been a teacher in this district? How many years have you been a teacher overall? Can you tell me about your role and responsibilities?

Section 2: Description of Learning in the Teacher Leader Cohort (25 minutes)

Step 1: Story Generating Level I wanted to start by talking about your experience in the three-year teacher leadership cohort. I’m hoping you could tell me a little about your experience learning in the teacher leader cohort?

1) In year one you focused on learning about yourself, including the concept of teacher leadership, adaptive and technical and learned about developmental diversity or how adults make sense of the world with different Ways of Knowing.

Probe:
- What was a powerful aha moment or favorite activity for you in year one?
- What if anything did you learn that was helpful?
- How, if at all did you apply any of your new learning?
- Is there anything else you would like to share about your learning from the first year?

2) In year two you focused on teaming, learned about “one bad apple,” group think, and developmental protocols such as surveys and setting norms to enhance your teams.

Probe:
- What was a powerful aha moment or favorite activity during year 2?
- What if anything did you learn that was helpful?
- How, if at all did you apply any of your new learning?
- Is there anything else you would like to share about your learning from the 2nd year?

3) In year three you focused on assuming a leadership role and you learned about critical conversations. You also set an improvement goal, administered your teaming survey and led a self-chosen initiative that you were passionate about.

Probe:
• What was a powerful aha moment or favorite activity for you in year one?
• What if anything did you learn that was helpful?
• How, if at all did you apply any of your new learning?
• Is there anything else you would like to share about your learning from the third year?

Section 3: Teacher Leader Challenges (20 minutes)

1) I want to give you a few minutes to think and take you back in time to three years ago, when you applied and were accepted into the teacher leader cohort. I want to invite you to think back to what was going on for you at that time and what was challenging for you.

*Note to Interviewer: Pause and give participant a full minute.*

**Probes:**
- Is this a challenge now?
- How if at all did the cohort help you?

2) **What if anything comes to mind when you think about a challenge as a teacher leader in regards to collaboration?**

**Probes:**
- How, if at all, has the way you’re dealing with it changed over time?
- How if at all did the institute help you?

3) **What if anything comes to mind when you think about a challenge as a teacher leader in regards to teaming?**

**Probes:**
- How if at all did the institute help you?

4) **What if anything comes to mind when you think about a challenge as a teacher leader in regards to workload?**

**Probes:**
- How, if at all, has the way you’re dealing with it changed over time?
- How if at all did the institute help you?

5) **This is a fill in the blank question: Before the training I would… Now I…..**

**Probes:**
- Is there anything else you would like to add?

Section 4: Closing (5 minutes)

1) Is there anything else you want to tell me about any of the questions I’ve asked?

2) Do you have any questions for me?
3) If I have any further questions, would you be willing to talk with me between now and the second interview?

I would like to send you a copy of the transcript from this interview for you to review for accuracy. Will that be OK?

_________ YES ___________ NO

Please confirm which email address you’d like me to use for sending your transcript and communications about this work.

Best Email: ___________

Thank you so very much!
Introduction to Interview: Context Setting (5 minutes)

1. Appreciation & Introduction
Thank you very much for agreeing to this second interview, and for the gift of your time today and previously during our first interview. I want to re-confirm your consent to audio-record this interview. Is that ok with you? This interview is intended to be a 60-minute follow-up interview regarding your experience in the teacher leader cohort. Do you have any questions about the consent or anything else at this time?

2. Overview of Our Purpose and Goals
Before beginning, I want to remind you that the purpose of the interview is to learn about your experience in the Teacher Leader Cohort. Today we’ll talk more specifically about the training and how, if at all you have used it in your practice as a teacher and teacher leader. There are no right or wrong answers; rather I will be talking with you to better understand your leadership experience. I also want to remind you that we can stop at anytime. Thank you so very much, in advance, for your help and time.

3. Confidentiality
In any publications, Christy will disguise your name and honor confidentiality. In writing, Christy may quote things that you say but we’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer. I want to confirm that you selected ______ as your alias.

4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

5. Review
For a quick review, last time we discussed the challenges you face as a teacher, and your experience in the teacher leadership cohort. The goal of today’s interview is to further discuss how, if at all, you have applied what you learned from the cohort into your practice as a teacher and teacher leader. Before we begin do you have any questions?

Thank you, let’s get started.

Section 1: Review (5 minutes)

Today I’m excited to learn about your practice as a teacher leader. Before we talk about your practice as a teacher leader today, I wanted to pause and see if there was anything you wanted to elaborate on, revisit, or discuss from our first interview?
I also want to share with you a couple of things that stood out from the first interview to check interpretations, would it be okay if I reviewed a couple of highlights with you?

*Note to Interviewer a summary for each participant will be provided.*

**Section 2: How if, at all have participants applied concepts from the institute into their teacher leader practice? (25 minutes)**

**Step 1: Story Generating Level I** I wanted to start by talking about your experience in the three-year teacher leadership cohort. I’m hoping you could tell me a little about your experience learning in the teacher leader cohort?

1) **In year one you focused on learning about yourself, including the concept of teacher leadership, adaptive and technical and learned about developmental diversity or how adults make sense of the world with different Ways of Knowing.**

**Probe:**
- What was a powerful aha moment or favorite activity for you in year one?
- What if anything did you learn that was helpful?
- How, if at all did you apply any of your new learning?
- Is there anything else you would like to share about your learning from the first year?

2) **Is there anything you learned from the teacher leader cohort that you specifically transferred to your practice when working on your team?**

**Probes:**
- Can you share an example or story?
- How, if at all are you using what you’ve learned in the teacher leader cohort to support your practice as a teacher leader?

3) **Was there something that you learned from the teacher leader cohort that you specifically use in your practice as a teacher leader when you are working with colleagues, i.e. collaborating and engaging in conversations?**

**Probes:**
- Can you share an example or story?
- How, if at all are you using what you’ve learned in the teacher leader cohort to support your practice as a teacher leader?

4) **What types of additional formal responsibilities, formal and rmrmal do/did you take on?**

**Probes:**
- Can you share an example or story?
- How, if at all are you using what you’ve learned in the teacher leader cohort to support you with this additional responsibility?
5) If you had a wish list of anything you could have changed about the training that would have made it more meaningful what would you put on your wish list?
   - What if anything has not been helpful/meaningful from the training?
   - How so?
   - Do you have an example or a story?

Section 3: Assuming Additional Teacher Leader Responsibility (20 minutes)

1) Thinking back to three years ago, before your three years in the teacher leader cohort, is there anything you do differently today as a result of the influence of the training?
   Probes:
   - In respect to collaborating with others?
     - Can you share an example or story?
     - How if at all has this been helpful with collaborating with others?
   - In respect to teaming?
     - Can you share an example or story?
     - How if at all has this been helpful with teaming?
   - In respect to assuming a leadership role?
     - Can you share an example or story?
     - How if at all has this been helpful with assuming a leadership role?

2) And, the last question—if you feel comfortable sharing—is what have you learned about yourself from the teacher leadership cohort? (5 minutes)

Section 4: Closing (5 minutes)

1) Given that Christy is the facilitator and the researcher did that influence your responses in any way?
   Probes:
   - Would you have answered any of the questions differently if she was not privy to your responses?

2) Is there anything else you want to tell me about any of the questions I’ve asked?

3) Do you have any questions for me?

4) If we have any further questions, would you be willing to talk with me between now and the second interview?

I would like to send you a copy of the transcript of this interview for you to review for accuracy. Will that be OK?

_________ YES  __________ NO
Please confirm which email address you’d like me to use for sending your transcript and communications about this work.

Best Email: ______________

Thank you so very much!
Appendix D: DILI Non-Completer Teacher Leader Interview Protocol

Partial Completer Teacher Interview Protocol

Name of Interviewee: ________________________________

Name of Interviewer: ______________________________

Date: _________________________________

Start Time of Interview: __________   End time of Interview: __________

Introduction to Interview: Context Setting (5 minutes)

My name is Marta and I will be interviewing you to learn about your experience as a teacher leader in the Teacher Leader Cohort. I know you worked with Christy over the last three years, and I feel honored to be interviewing you. In case helpful to know, I support nursing students in earning their doctorate. Christy hired me because she wants you to feel as comfortable as possible talking openly about your experience as a teacher leader and in the teacher leader cohort. I also want you to know that I have talked with Christy at great length to learn about the district, the teacher leadership cohort and your work, and we will continue to talk throughout the course of this process so if you have any questions feel free to let either of us know! As we go forward I will be speaking in the “I” voice during our interview to make it more personal.

1. Appreciation & Introduction

Thank you very much for agreeing to this interview. Also, thank you for signing and returning the consent form and for giving your permission to audio-record this interview. Can we please reconfirm if both of these are still okay? Do you have any questions about the consent form at this time?

2. Overview of Our Purpose and Goals

Before beginning, I want to remind you that the purpose of the interview is to learn about your experience in the Teacher Leader Cohort. We are interested in learning about your experience, the challenges you face as a teacher and, and how, if at all you have applied any learnings from the cohort in your practice as a teacher and teacher leader. There are no right or wrong answers; rather I will be talking with you to better understand your leadership experience. This interview will take about 60 minutes. Thank you so very much, in advance, for your help and time.

3. Confidentiality

In any publications, we will disguise your name and honor confidentiality. We may quote things that you say but we’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer.

Would you like to select an alias or would you like me to select one for you? __________

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4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

**Section 1: Teacher Leader Background and Context (5 minutes)**

1) I’d like to start by learning a little about you—if that’s ok? How many years have you been a teacher in this district? How many years have you been a teacher overall? Can you tell me about your role and responsibilities?

**Section 2: Description of Learning in the Teacher Leader Cohort (25 minutes)**

Step 1: Story Generating Level I wanted to start by talking about your experience in the three-year teacher leadership cohort. I’m hoping you could tell me a little about your experience learning in the cohort?

1) In year one you focused on learning about yourself, including the concept of teacher leadership, adaptive and technical and learned about developmental diversity or how adults make sense of the world with different Ways of Knowing.

Probe:
- What was a powerful aha moment or favorite activity for you in year one?
- What if anything did you learn that was helpful?
- How, if at all did you apply any of your new learning?
- Is there anything else you would like to share about your learning from the first year?

2) In year two you focused on teaming, learned about “one bad apple,” group think, and developmental protocols such as surveys and setting norms.

Probe:
- What was a powerful aha moment or favorite activity during year 2?
- What if anything did you learn that was helpful?
- How, if at all did you apply any of your new learning?
- Is there anything else you would like to share about your learning from the 2nd year?

3) Can you describe if there was anything you specifically learned that you incorporated into your practice as a teacher and teacher leader?

Probes:
- Ask when learned?
- How learned?
- How did you incorporate this into your practice as a teacher leader? Can you give an example or share a story?
- How is it working? What’s going well? What’s hard?
Section 3: Teacher Leader Challenges (20 minutes)

1) I want to give you a few minutes to think and take you back in time to three years ago, when you applied and were accepted into the teacher leader cohort. I want to invite you to think back to what was going on for you at that time and what was challenging for you.

*Note to Interviewer:* Pause and give participant a full minute.

**Probes:**
- Is this a challenge now?
- How if at all did the cohort help you?

2) If you had a wish list of anything you could have changed about the training that would have made it more meaningful what would you put on your wish list?

**Probes:**
- What if anything has not been helpful/meaningful from the training?
- How so?
- Do you have an example or a story?

3) Would you be willing to share your reason for choosing not to continue with the leadership cohort?

**Probes:**
- What if anything has not been helpful/meaningful from the training?
- If you had a wish list of anything you could have changed about the training that would have made it more meaningful what would you put on your wish list?
- How so?
- Do you have an example or a story?

Section 4: Closing (5 minutes)

1) Given that Christy is the facilitator and the researcher did that influence your responses in any way?

**Probes:**
Would you have answered any of the questions differently if she was not privy to your responses?

2) Is there anything else you want to tell me about any of the questions I’ve asked?

3) Do you have any questions for me?

4) If we have any further questions, would you be willing to talk with me between now and the second interview?
I would like to send you a copy of our transcript of this interview for you to review for accuracy. Will that be OK?

_________ YES  __________ NO

Please confirm which email address you’d like me to use for sending your transcript and communications about this work.

Best Email: ____________

Thank you so very much!
Appendix E: Principal Interview Protocol

Name of Interviewee: __________________________

Name of Interviewer: __________________________

Date: __________________________

Start Time of Interview: ________ End time of Interview: ________

**Introduction to Interview: Context Setting**

(5 minutes)

My name is Marta, and I will be interviewing you to learn about your experience as a principal who participated and had teachers you oversee participate in the Teacher Leader Cohort. I know you worked with Christy over the last three years, and I feel honored to be interviewing you. In case helpful to know, I support nursing students in earning their doctorate. Christy hired me because she wants you to feel as comfortable as possible talking openly about your experience as a teacher leader and in the teacher leader cohort. I also want you to know that I have talked with Christy at great length to learn about the district, the teacher leadership cohort and your work, and we will continue to talk throughout the course of this process so if you have any questions feel free to let either of us know! As we go forward I will be speaking in the “I voice” during our interview to make it more personal.

1. **Appreciation & Introduction**

Thank you very much for agreeing to this interview. Also, thank you for signing and returning the consent form and for giving your permission to audio-record this interview. Can we please re-confirm if both of these are still okay? Do you have any questions about the consent form at this time?

2. **Overview of Our Purpose and Goals**

Before beginning, I want to remind you that the purpose of the interview is to learn about your experience as an administrator in the Teacher Leader Cohort, and how if at all you saw this training influence the teachers you supervise, and support other teachers or students in your care. We are interested in learning about your experience, your experience participating in the Teacher Leader Cohort with your teachers, and how if at all supporting their capacity transferred to be supportive of others in your building. This interview will take about 90 minutes. Thank you so very much, in advance, for your help and time.

3. **Confidentiality**

In any publications, we will disguise your name and honor confidentiality. We may quote things that you say but we’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer.

Would you like to select an alias? __________________________

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4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

So, let’s get started.

Introduction to Interview: Context Setting (5 minutes)

1. Appreciation & Introduction
Thank you very much for agreeing to this interview. Also, thank you for signing and returning the consent form and for giving your permission to audio-record this interview. Do you have any questions about the consent form at this time?

2. Overview of Our Purpose and Goals
Before beginning, I want to remind you that the purpose of the interview is to learn about your experience as an administrator in the Teacher Leader Cohort, and how if at all you saw this training influence the teachers you supervise, and others in your building. We are interested in learning about your experience, the experience of the teachers, and if there was anything influential from the training that extended to the participants in your building. This interview will take about 90 minutes. Thank you so very much, in advance, for your help and time.

3. Confidentiality
In any publications, we will disguise your name and honor confidentiality. We may quote things that you say but we’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer.

Would you like to select an alias or would you like me to select an alias? _________________

4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

So, let’s get started.

Section 1: Administrator Background and Context (5 minutes)

1) I’d like to start by learning a little about you—if that’s ok?
Probes:
- How many years have you been a principal in this district?
- How many years have you been an educator overall?
- How did you come to this position?

Section 2: Administrator Learning (20 Minutes)

How would you describe your learning experience (what and how you learned) in the three-year teacher leadership cohort?

1) What learning did you experience yourself?
   Probes:
   - Can you share a story or example?
   - How, if at all, was this helpful?

2) How would you describe participating in the teacher leader cohort with your teachers?
   Probes:
   - Can you share a story or example?
   - How, if at all, was this helpful?

3) What learning do you think the teachers in your care experienced?
   Probes:
   - Can you share a story or example?
   - Did you see this transfer beyond the cohort and into their practice in any way?
   - How, if at all, was this helpful?
     - For the teacher?
     - For your school?

Section 3: Transfer of Learning & The Influence of the Teacher Leader Cohort (30 minutes)

How would you describe the influence of the teacher leader cohort professional learning?

1) How would you describe the influence on the teacher leader participants?
   Probes:
   - Can you share a story or example?
   - How, if at all, did this support other teachers in your building?

2) Did you notice that the teachers in the institute took on more responsibility?
   Probes:
   - Can you share a story or example?
   - How, if at all, did this support other teachers in your building?
3) Did you notice the teachers apply any of their learning in their teams and in collaborating?

Probes:
- Can you share a story or example?
- How, if at all did this support other teachers in your building?

4) If you had a wish list of anything you could have changed about the training that would have made it more meaningful what would you put on your wish list?

Probes:
- What if anything has not been helpful/meaningful from the training?
- How so?
- Do you have an example or a story?

**Section 4: Closing (5 minutes)**

1) Given that Christy is the facilitator and the researcher did that influence your responses in any way?

Probes:
- Would you have answered any of the questions differently if she was not privy to your responses?

2) Is there anything else you want to tell me about any of the questions I’ve asked?

3) Do you have any questions for me?

4) If we have any further questions, would you be willing to talk with me?

I would like to send you a copy of our transcript of this interview for you to review for accuracy. Will that be OK?

__________YES ___________ NO

Please confirm which email address you’d like me to use for sending your transcript and communications about this work.

Best Email: __________

Thank you so very much!
Appendix F: District Administrator Interview Protocol

Name of Interviewee: ________________________________

Name of Interviewer: _______________________________

Date: ________________________________

Start Time of Interview: ___________ End time of Interview: ___________

Introduction to Interview: Context Setting (5 minutes)

My name is Marta, and I will be interviewing you to learn about your experience as a district administrator who participated and had teachers you oversee participate in the Teacher Leader Cohort. I know you worked with Christy over the last three years, and I feel honored to be interviewing you. In case helpful to know, I support nursing students in earning their doctorate. Christy hired me because she wants you to feel as comfortable as possible talking openly about your experience as a teacher leader and in the teacher leader cohort. I also want you to know that I have talked with Christy at great length to learn about the district, the teacher leadership cohort and your work, and we will continue to talk throughout the course of this process so if you have any questions feel free to let either of us know! As we go forward I will be speaking in the “I voice” during our interview to make it more personal.

1. Appreciation & Introduction
Thank you very much for agreeing to this interview. Also, thank you for signing and returning the consent form and for giving your permission to audio-record this interview. Do you have any questions about the consent form at this time?

2. Overview of Our Purpose and Goals
Before beginning, I want to remind you that the purpose of the interview is to learn about your experience as an administrator in the Teacher Leader Cohort, and how if at all you saw this training influence the teachers you supervise, and the district. We are interested in learning about your experience, the experience of the teachers, and if there was anything influential from the training that extended to the participants and you’re building. This interview will take about 90 minutes. Thank you so very much, in advance, for your help and time.

3. Confidentiality
In any publications, we will disguise your name and honor confidentiality. We may quote things that you say but we’d never use your name. I’d also like to remind you that you do not have to answer any question that you choose not to answer.

Would you like to select an alias or would you like me to select an alias? ____________
4. Questions
Do you have any questions before we begin? If you have questions at any time, please let me know.

So, let’s get started.

Section 1: Administrator Background and Context (5 minutes)

1) I’d like to start by learning a little about you—if that’s ok?
   • How many years have you been an administrator in this district?
   • How many years have you an educator overall?
   • How did you come to this position?

Section 2: Administrator Learning (25 Minutes)
How would you describe the learning experience (what and how you learned) in the three-year teacher leadership cohort?

1) How would you describe your learning experience (what and how you learned) in the three-year teacher leadership cohort?
   
   What learning did you experience yourself?
   
   Probes:
   • Can you share a story or example?
   • How if at all was this helpful?

2) How would you describe participating in the teacher leader cohort with your teachers and fellow administrators?
   
   Probes:
   • Can you share a story or example?
   • How, if at all was this helpful?

3) What learning do you think the teachers in your care experienced?
   
   Probes:
   • Can you share a story or example?
   • Did you see this transfer beyond the cohort and into their practice in any way?
   • How if at all was this helpful?

Section 3: Transfer of Learning & The Influence of the Teacher Leader Cohort (30 minutes)

How would you describe the influence of the teacher leader cohort professional learning?
1) **How would you describe the influence on the teacher leader participants?**
   **Probes:**
   Can you share a story or example?
   How, if at all did this support other teachers in your building?

2) **Did you notice that the teachers in the institute took on more responsibility?**
   **Probes:**
   Can you share a story or example?
   How, if at all did this support other teachers in your building?

3) **Did you notice the teachers apply any of their learning in their teams and in collaborating?**
   **Probes:**
   Can you share a story or example?
   How, if at all did this support other teachers in your building?

4) **If you had a wish list of anything you could have changed about the training that would have made it more meaningful what would you put on your wish list?**
   **Probes:**
   - What if anything has not been helpful/meaningful from the training?
   - How so?
   - Do you have an example or a story?

---

**Section 4: Closing (5 minutes)**

1) Given that Christy is the facilitator and the researcher did that influence your responses in any way?
   **Probes:**
   - Would you have answered any of the questions differently if she was not privy to your responses?

2) Is there anything else you want to tell me about any of the questions I’ve asked?

3) Do you have any questions for me?

4) If we have any further questions, would you be willing to talk with me?

I would like to send you a copy of our transcript of this interview for you to review for accuracy. Will that be OK?

___________ YES  ___________ NO

Please confirm which email address you’d like me to use for sending your transcript and communications about this work.
Best Email:___________
Thank you so very much!
Appendix G: Developmentally Intentional Learning Activities in the DILI

<table>
<thead>
<tr>
<th>Learning Activity</th>
<th>Developmental Support for Learning</th>
</tr>
</thead>
</table>
| Reflection                  | • Time to process new learnings.  
• Opportunity to challenge assumptions independently.                                                                                                           |
| Collegial Inquiry           | • Opportunity to collaborate, discuss, and expand upon new learnings with others.  
• Opportunity to challenge assumptions with others.  
• Make connections with others, their struggles, and learn from best practices.  
• Receive feedback.                                                                                                                                         |
| Role Playing                | • Opportunity to try out new learnings with others before transferring outside DILI.  
• Time and space to ask questions and process new learnings.  
• Receive coaching and in the moment feedback from administrators and peers.                                                                                   |
| Practice Difficult Conversations | • Opportunity to try out new learnings with others before transferring outside DILI.  
• Receive coaching and in the moment feedback from administrators and peers.  
• Opportunity to collaborate with others and seek input/feedback from trusted peers.                                                                           |
| Plan Professional Development | • Time to plan professional development.  
• Opportunity to collaborate with others and seek input/feedback from trusted peers.  
• Resources required to learn and turnkey content.  
• Receive coaching and in-the-moment feedback from administrators and peers.                                                                                   |
| Plan Team Meetings          | • Opportunity to collaborate with others and seek input/feedback from trusted peers.  
• Opportunity to try out new learnings with others before transferring outside DILI.  
• Time to plan team meetings; time to practice, apply, and seek input from others.  
• Receive coaching and in the moment feedback from administrators and peers.                                                                                   |
### Analyze Survey Data
- Opportunity to collaborate with others and seek input/feedback from trusted peers.
- Opportunity to try out new learnings with others before transferring outside DILI.
- Time to analyze data and plan team meetings to share results and set team goals.
- Time to practice, apply, and seek input from others.

### Book Clubs
- Opportunity to collaborate, discuss, and expand upon new learnings with others.
- Opportunity to challenge assumptions with others.
- Time, space, resources, and partnerships to extend and apply new learnings.
Appendix H: Invitation Letter for the MELC School District DILI

September 5, 2016
Dear [MELC] Staff,

Every educator makes a difference, each and every day. Never lose sight of how important you are to our students, to your team, and to our community. This profession calls us to lead students and each other on a path of lifelong learning.

We’re at a time when our educational system is being reinvented to prepare our children for a more competitive environment, and while some may say teaching right now is like Charles Dickens Tale of Two Cities, the Worst of Times and the Best of times, I want to compliment you on how you stay focused on the best of times….The eager children in the classroom, their humorous budding personalities, who love us back, and how you embrace the opportunity to improve on behalf of the students in our care.

However, with the increased demands and the rate at which the world is changing- we know we can’t do this monumental task of educating every child in our room alone, we know that we need those around us more than ever, and that we’re important to each other. This is an invitation to grow as a person, an adult learner, and a teacher. You are formally invited to apply to participate in a **Teacher Leadership Cohort**. This cohort will bring together 15 teachers across the district who will form a cohort and meet in a series of professional development sessions, (1 day a month for a half day) to help grow the development of our internal capacities, and for our own growth to then transcend and help forge stronger teams of educators, which ultimately leads to enhanced learning for our students. We will also have the great privilege of having two full days of training with Dr. Ellie Drago-Severson, an award winning author and professor from Harvard and Columbia University.

This is an opportunity for us to improve ourselves, and make more of a difference in how we educate our students. We hope you’ll consider learning with us! If you are interested please email Dr. Lynda by Friday, September 2nd. There are a limited number of spots available so acceptance to the cohort will be granted on a first come first serve basis!

Warmest regards,
Lynda (Superintendent) & Christy (Researcher)
Appendix I: Research Site Permission Letter From the MELC School District

June 4, 2019

To Whom It May Concern:

On May 28th, the Board of Directors of the MELC School District unanimously granted permission for the [REDacted] to serve as a research site for Christy Joswick-O’Connor’s study “The Experience of Teachers in a Developmentally Intentional Leadership Institute.” This permission is granted pending approval from the Institutional Review Board from Teachers College, Columbia University.

Sincerely,

[REDacted]
Appendix J: IRB Approval Letter

To: Christy O'Connor
From: Amy Camilleri
Subject: IRB Approval: 19-412 Protocol
Date: 06/22/2019

Please be informed that as of the date of this letter, the Institutional Review Board for the Protection of Human Subjects at Teachers College, Columbia University has given full approval to your study, entitled "The Experiences of Teachers in a Developmentally Intentional Leadership Institute (Part 2)," under Expedited Review on 06/22/2019. Category (7) Research on individual or group characteristics or behavior.

The IRB Committee must be contacted if there are any changes to the protocol during this period. Under the new IRB regulations, continuing review for this study is not required. If you encounter any problems or issues, please contact the IRB office to discuss. When you have completed the study, please terminate using the "Terminate Protocol" button at the top of the view protocol page in Mentor IRB. The IRB number assigned to your protocol is 19-412. Feel free to contact the IRB Office (212-678-4706 or acamilleri@gmail.com) if you have any questions.

Please note that your Consent form bears an official IRB authorization stamp and is attached to this email. Copies of this form with the IRB stamp must be used for your research work. Further, all research recruitment materials must include the study's IRB-approved protocol number.

As the PI of record for this protocol, you are required to:

- Use current, up-to-date IRB approved documents
- Ensure all study staff and their CITI certifications are on record with the IRB
- Notify the IRB of any changes or modifications to your study procedures
- Alert the IRB of any adverse events

You are also required to respond if the IRB communicates with you directly about any aspect of your protocol. Failure to adhere to your responsibilities as a study PI can result in action by the IRB up to and including suspension of your approval and cessation of your research.

You can retrieve a PDF copy of this approval letter from Mentor IRB.

When your study ends, please visit the IRB Mentor site. Go to the view protocol page and click on the "Terminate Protocol" button at the top.

Best wishes for your research work.

Sincerely,
Amy Camilleri
IRB Administrator
IRB@tcu.edu

Attachments:
- Informed Consent Administrator Participants Final Final.pdf
- Informed Consent Full Teacher Participants Final Final.pdf
- Informed Consent Partial Teacher Participants Final Final.pdf
Appendix K: Recruitment Letter for DILI Completers

Hello Teacher Leadership Team!

As you know I’m Christy Joswick-O’Connor, your supervisor English Language Arts and the facilitator for our teacher leadership cohort. I’m also a doctoral student at Teachers College. I am working on my dissertation, and seek to learn more about teacher leadership and what professional development feels most meaningful for you in terms of preparing you for the current challenges you face in your roles as teachers. My purpose for conducting this project is to learn more about your experience in the teacher leadership program, and how if at all it has influenced your teacher—leadership practice.

Being a former teacher and a current supervisor I understand the challenges and pressures of education today and would like to study how, if at all, the developmentally oriented professional learning institute has influenced your practice for my dissertation.

I would love to have the opportunity to interview each of you to learn about your experience. However, I will not be conducting the interviews myself, given my position as a supervisor and as the facilitator of our teacher leader cohort, and since I want you to feel as comfortable as possible sharing your experience including the positive and possible negative aspects. I hope to learn about your experience in 2, one-hour interviews I will ask for your permission to record your interview for accuracy, and so that I can listen to it, and learn from your experience. The interviews will take place at your convenience over the phone, and I will ask your permission to tape record the interviews so that I may learn from you. The interviews will be transcribed and recordings will be deleted immediately. Feel free to bring any questions or concerns you have to me at any time.
If you agree to participate in this research you will receive an informed consent form that outlines the requirements of this study including two 60-minute interviews and your permission to allow me to record your interview. All interviews will be confidential and pseudonyms will be used.

Thank you so much,

Christy
Appendix L: Recruitment Letter for DILI Non-Completers

Hello Teacher Leadership Team!

As you know I’m Christy Joswick-O’Connor, your supervisor English Language Arts and the facilitator for our teacher leadership cohort. I’m also a doctoral student at Teachers College. I am working on my dissertation, and seek to learn more about teacher leadership and what professional development feels most meaningful for you in terms of preparing you for the current challenges you face in your roles as teachers. My purpose for conducting this project is to learn more about your experience in the teacher leadership program, and how if at all it has influenced your teacher—leadership practice.

Being a former teacher and a current supervisor I understand the challenges and pressures of education today and would like to study how, if at all, the developmentally oriented professional learning institute has influenced your practice for my dissertation.

I would love to have the opportunity to interview each of you to learn about your experience. However, I will not be conducting the interviews myself, given my position as a supervisor and as the facilitator of our teacher leader cohort, and since I want you to feel as comfortable as possible sharing your experience including the positive and possible negative aspects. I hope to learn about your experience in 1, one-hour interviews I will ask for your permission to record your interview for accuracy, and so that I can listen to it, and learn from your experience. The interviews will take place at your convenience over the phone, and I will ask your permission to tape record the interviews so that I may learn from you. The interviews will be transcribed and recordings will be deleted immediately. Feel free to bring any questions or concerns you have to me at any time.
If you agree to participate in this research you will receive an informed consent form that outlines the requirements of this study including one 60-minute interview and your permission to allow me to record your interview. All interviews will be confidential and pseudonyms will be used.

Thank you so much,

Christy
Appendix M: Recruitment Letter for Administrators

Hello Admin Team!

As you know I’m Christy Joswick-O’Connor, the supervisor of English Language Arts and the facilitator for our teacher leadership cohort. I’m also a doctoral student at Teachers College. I am working on my dissertation, and seek to learn more about teacher leadership and what professional development feels most meaningful for you in terms of preparing you for the current challenges you face in your roles as teachers. My purpose for conducting this project is to learn more about your experience in the teacher leadership program, and how if at all it has influenced your teachers, respective building, and the students.

Being a former teacher and a current supervisor I understand the challenges and pressures of education today and would like to study how, if at all, the developmentally oriented professional learning institute has influenced your practice for my dissertation.

I would love to have the opportunity to interview each of you to learn about your experience. However, I will not be conducting the interviews myself, given my position as a supervisor and as the facilitator of our teacher leader cohort, and since I want you to feel as comfortable as possible sharing your experience including the positive and possible negative aspects. I hope to learn about your experience in 1, 90-minute interview I will ask for your permission to record your interview for accuracy, and so that I can listen to it, learn from your experience. The interviews will take place at your convenience over the phone, and I will ask your permission to tape record the interviews so that I may learn from you. The interviews will be transcribed and recordings will be deleted immediately. Feel free to bring any questions or concerns you have to me at any time.
If you agree to participate in this research you will receive an informed consent form that outlines the requirements of this study including one 90-minute interviews and your permission to allow me to record your interview. All interviews will be confidential and pseudonyms will be used.

Thank you so much,

Christy
Appendix N: Administrators Informed Consent and Statement of Participant Rights

TEACHERS COLLEGE
COLUMBIA UNIVERSITY
525 WEST 120TH STREET
NEW YORK, NY 10027

Informed Consent For Administrator Participants

Study Title: The Experiences of Teachers in a Developmentally Intentional Leadership Institute

Principal Investigator: Christy Joswick-O’Connor, Doctoral Student, Teachers College, Columbia University (tel: 610-217-5804)

IRB Protocol #: 19-412

Introduction

I would like to invite you to participate in this research study, The Experiences of Teachers in a Developmentally Intentional Leadership Institute. You qualify to take part in this research study because you work in the Florham Park School District in Florham Park, NJ and participated in the Teacher Leader Institute between 2016-2019. Approximately 22 people will participate in this study and it will take 90 minutes of your time to complete.

Why is this study being done?

This study seeks to understand i) the challenges teacher face, and ii) to understand how (if at all), participation in a developmentally intentional leadership institute has supported teacher leaders in managing these challenges.

What will I be asked to do if I agree to take part in this study?

If you decide to participate, a research assistant who is CITI certified will conduct one 90-minute audio-recorded individual interviews either face-to-face, Zoom (teleconference), or telephone. The interview will be scheduled in August or September 2019. During the individual interview you will be asked to discuss your experience in the leadership cohort, and about the teachers who participated. Specifically you will be asked how if at all, participating in the cohort influenced the teachers’ and if you felt the teachers transferred things they learned from the cohort to their teams or other teachers in the district.

What possible risks and/or discomforts can I expect from taking part in this study?

This is a minimal risk study, which means the harms or discomforts that you may experience are not greater than you would ordinarily encounter in daily life while talking about experiences in
your workplace. However, there are some small risks to consider. You might feel discomfort responding to questions regarding any difficult workplace experiences that may have arisen for you. *However, you may skip any question that you do not wish to answer and you do not have to divulge anything you do not want to address. You may stop participating in the study at any time without penalty.*

You might also feel concerned that things you say might get back to people you work with. However, strict confidentiality will be maintained and nothing you say will be shared with other interview participants. I am taking precautions to keep your information confidential and prevent anyone from discovering or guessing your identity, such as using a pseudonym instead of your name and keeping all information on a password protected computer and locked in a file drawer.

**What possible benefits can I expect from taking part in this study?**

There is no direct benefit to you for participating in this study.

**Will I be paid for participating in this study?**

After your interviews are concluded, you will receive a $10 gift certificate to Amazon via email from the research assistant. There are no costs to you for taking part in this study.

**When will the study be over? May I leave the study before it ends?**

The study is over when you have completed one ninety-minute interview. Any participant may seek to discontinue their participation at any time.

**What protections are there for my confidentiality?**

I will keep all written materials locked in a desk drawer in my office. Any electronic or digital information will be stored on a computer that is password protected. Regulations require that research data be kept for at least three years, after which time the raw data will be destroyed. What is on the audio-recordings will be written down and the audio-recording will then be destroyed. There will be no record matching your real last name with your pseudonym. Regulations require that research data be kept for at least three years.

For quality assurance, the study team, study sponsor, and/or members of the Teachers College Institutional Review Board (IRB) may review the data collected from you as part of this study. Otherwise all information obtained from your participation in this study will be held strictly confidential and will be disclosed only with your permission or as required by U.S. or State law.

**How will the results be used?**

The results of this study will be published in my doctoral dissertation, and may be further
published in journals and conference presentations. This study is being conducted as part of the dissertation of Christy Joswick-O’Connor.

**CONSENT FOR AUDIO AND OR VIDEO RECORDING**

Audio recording is a part of this research study. You can choose whether to give permission to be recorded. If you decide that you don’t wish to be recorded, **you will not be able to participate** in this research study.

______ I give my consent to be recorded  ________________________________  Signature

**Who can answer questions about this study?**

If you have any questions about taking part in this research study, you may contact the principal investigator, Christy O’Connor (tel: 610-217-5804. email: cjj2117@tc.columbia.edu). You may also contact her faculty advisor, Prof. Eleanor Drago-Severson (tel: 212-678-4163).

**If you have questions or concerns about your rights as a research subject, you should contact the Institutional Review Board at Teachers College, Columbia University (tel: 212-678-4105. email IRB@tc.edu). Alternatively, you may write to:**

IRB  
Teachers College, Columbia University,  
525 W. 120th Street, New York, NY 10027  
The IRB is the committee that oversees human research protection for Teachers College, Columbia University.
TEACHERS COLLEGE
COLUMBIA UNIVERSITY
525 WEST 120th STREET
NEW YORK, NY 10027

Statement of Participants’ Rights

1) I have read and discussed the informed consent with the researcher. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.

2) I understand that my participation is voluntary. I may refuse to participate or withdraw participation at any time without penalty.

3) If, during the course of the study, significant new information develops or becomes available which may relate to my willingness to continue my participation, the investigator will provide this information to me.

4) Any information derived from the research study that personally identifies me will not be voluntarily released or disclosed without my separate consent, except as specifically required by law. De-identified data may be used for future research studies, or distributed to another researcher for future research without additional informed consent from you (the research participant or the research participant’s representative).

I have been given a copy of the informed consent document for my own records My signature indicates that I agree to participate in this study

Print Name: __________________________

Signature: __________________________ Date: __________________

Researcher’s Name: Christy Joswick-O’Connor

Researcher’s Signature: Christy Joswick-O’Connor Date: 6/13/19
Appendix O: DILI Completers Informed Consent and Statement of Participant Rights

Informed Consent For Teacher Participants who Fully Completed the DILI

Study Title: The Experiences of Teachers in a Developmentally Intentional Leadership Institute

Principal Investigator: Christy Joswick-O’Connor, Doctoral Candidate, Teachers College, Columbia University (tel: 610-217-5804)

IRB Protocol #: 19-412

Introduction

I would like to invite you to participate in this research study, *The Experiences of Teachers in a Developmentally Intentional Leadership Institute*. You qualify to take part in this research study because you work in the Florham Park School District in Florham Park, NJ and participated in the Teacher Leader Cohort from 2016-2019. Approximately 22 people will participate in this study and it will take two hours of your time to complete.

Why is this study being done?

This study seeks to understand i) the challenges teacher face, and ii) to understand how (if at all), participation in a developmentally intentional leadership institute has supported teacher leaders in managing these challenges.

What will I be asked to do if I agree to take part in this study?

If you decide to participate, a research assistant who is CITI certified will conduct two 60-minute audio-recorded individual interviews either face-to-face, Zoom (teleconference), or telephone. The first interview will be scheduled either in July or August 2019. The second interview will be scheduled between August and October 2019. During the individual interview you will be asked to discuss your experience in the teacher leader cohort, your practice as a teacher-leader, and how, if at all, you have extended experiences from the cohort into your practice.

What possible risks and/or discomforts can I expect from taking part in this study?

This is a minimal risk study, which means the harms or discomforts that you may experience are not greater than you would ordinarily encounter in daily life while talking about experiences in
your workplace. However, there are some small risks to consider. You might feel discomfort responding to questions regarding any difficult workplace experiences that may have arisen for you. However, you may skip any question that you do not wish to answer and you do not have to divulge anything you do not want to address. You may stop participating in the study at any time without penalty.

You might also feel concerned that things you say might get back to people you work with. However, strict confidentiality will be maintained and nothing you say will be shared with other interview participants. I am taking precautions to keep your information confidential and prevent anyone from discovering or guessing your identity, such as using a pseudonym instead of your name and keeping all information on a password protected computer and locked in a file drawer.

What possible benefits can I expect from taking part in this study?

There is no direct benefit to you for participating in this study.

Will I be paid for participating in this study?

After your interviews are concluded, you will receive a $10 gift certificate to Amazon via email from the research assistant. There are no costs to you for taking part in this study.

When will the study be over? May I leave the study before it ends?

The study is over when you have completed two sixty-minute interviews. Any participant may seek to discontinue their participation at any time.

What protections are there for my confidentiality?

I will keep all written materials locked in a desk drawer in my office. Any electronic or digital information will be stored on a computer that is password protected. Regulations require that research data be kept for at least three years, after which time the raw data will be destroyed. What is on the audio-recordings will be written down and the audio-recording then be destroyed. There will be no record matching your real last name with your pseudonym. Regulations require that research data be kept for at least three years.

For quality assurance, the study team, study sponsor, and/or members of the Teachers College Institutional Review Board (IRB) may review the data collected from you as part of this study. Otherwise all information obtained from your participation in this study will be held strictly confidential and will be disclosed only with your permission or as required by U.S. or State law.

How will the results be used?

The results of this study will be published in my doctoral dissertation, and may be further
published in journals and conference presentations. This study is being conducted as part of the dissertation of Christy Joswicke-O’Connor.

CONSENT FOR AUDIO AND OR VIDEO RECORDING
Audio recording is a part of this research study. You can choose whether to give permission to be recorded. If you decide that you don’t wish to be recorded, you will not be able to participate in this research study.

I give my consent to be recorded

Signature

Who can answer questions about this study?
If you have any questions about taking part in this research study, you may contact the principal investigator, Christy O’Connor (tel: 610-217-5804, email: cjj2117@tc.columbia.edu). You may also contact her faculty advisor, Prof. Eleanor Drago-Severson (tel: 212-678-4163).

If you have questions or concerns about your rights as a research subject, you should contact the Institutional Review Board at Teachers College, Columbia University (tel: 212-678-4105, email IRB@tc.edu). Alternatively, you may write to:

IRB
Teachers College, Columbia University,
525 W. 120th Street, New York, NY 10027

The IRB is the committee that oversees human research protection for Teachers College, Columbia University.
Statement of Participants' Rights

1) I have read and discussed the informed consent with the researcher. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.

2) I understand that my participation is voluntary. I may refuse to participate or withdraw participation at any time without penalty.

3) If, during the course of the study, significant new information develops or becomes available which may relate to my willingness to continue my participation, the investigator will provide this information to me.

4) Any information derived from the research study that personally identifies me will not be voluntarily released or disclosed without my separate consent, except as specifically required by law. De-identified data may be used for future research studies, or distributed to another researcher for future research without additional informed consent from you (the research participant or the research participant’s representative).

I have been given a copy of the informed consent document for my own records. My signature indicates that I agree to participate in this study.

Print Name: __________________________________________

Signature: __________________________________________ Date: __________________

Researcher’s Name: Christy Joswick-O’Connor

Researcher’s Signature: Christy Joswick-O’Connor Date: 6/13/19
Appendix P: DILI Non-Completers Informed Consent and Statement of Participant Rights

TEACHERS COLLEGE
COLUMBIA UNIVERSITY
525 WEST 120th STREET
NEW YORK, NY 10027

Informed Consent For Teacher Participants who Partially Completed the DILI

Study Title: The Experiences of Teachers in a Developmentally Intentional Leadership Institute

Principal Investigator: Christy Joswick-O’Connor, Doctoral Candidate, Teachers College, Columbia University (tel: 610-217-5804)

IRB Protocol #: 19-412

Introduction

I would like to invite you to participate in this research study, The Experiences of Teachers in a Developmentally Intentional Leadership Institute. You qualify to take part in this research study because you work in the Florham Park School District in Florham Park, NJ and participated in the Teacher Leader Institute for one or two years between 2016-2019. Approximately 22 people will participate in this study and it will take one hour of your time to complete.

Why is this study being done?

This study seeks to understand i) the challenges teacher face, and ii) to understand how (if at all), participation in a developmentally intentional leadership institute has supported teacher leaders in managing these challenges.

What will I be asked to do if I agree to take part in this study?

If you decide to participate, a CITI certified research assistant will conduct one- 60-minute audio-recorded individual interviews either face-to-face, Zoom (teleconference), or telephone. The first interview will be scheduled either in July or August 2019. During the individual interview you will be asked to discuss your experience in the leadership cohort, your practice as a teacher-leader, and how, if at all, you have extended experiences from the cohort in your practice. You will also be asked about your decision to not complete the three years of the cohort.

What possible risks and/or discomforts can I expect from taking part in this study?

This is a minimal risk study, which means the harms or discomforts that you may experience are not greater than you would ordinarily encounter in daily life while talking about experiences in
your workplace. However, there are some small risks to consider. You might feel discomfort responding to questions regarding any difficult workplace experiences that may have arisen for you. However, you may skip any question that you do not wish to answer and you do not have to divulge anything you do not want to address. You may stop participating in the study at any time without penalty.

You might also feel concerned that things you say might get back to people you work with. However, strict confidentiality will be maintained and nothing you say will be shared with other interview participants. I am taking precautions to keep your information confidential and prevent anyone from discovering or guessing your identity, such as using a pseudonym instead of your name and keeping all information on a password protected computer and locked in a file drawer.

**What possible benefits can I expect from taking part in this study?**

There is no direct benefit to you for participating in this study.

**Will I be paid for participating in this study?**

After your interviews are concluded, you will receive a $10 gift certificate to Amazon via email from the research assistant. There are no costs to you for taking part in this study.

**When will be study be over? May I leave the study before it ends?**

The study is over when you have completed one sixty-minute interview. Any participant may seek to discontinue their participation at any time.

**What protections are there for my confidentiality?**

I will keep all written materials locked in a desk drawer in my office. Any electronic or digital information will be stored on a computer that is password protected. Regulations require that research data be kept for at least three years, after which time the raw data will be destroyed. What is on the audio-recordings will be written down and the audio-recording will then be destroyed. There will be no record matching your real last name with your pseudonym. Regulations require that research data be kept for at least three years.

For quality assurance, the study team, study sponsor, and/or members of the Teachers College Institutional Review Board (IRB) may review the data collected from you as part of this study. Otherwise all information obtained from your participation in this study will be held strictly confidential and will be disclosed only with your permission or as required by U.S. or State law.

**How will the results be used?**

The results of this study will be published in my doctoral dissertation, and may be further
published in journals and conference presentations. This study is being conducted as part of the dissertation of Christy Joswick-O’Connor.

CONSENT FOR AUDIO AND OR VIDEO RECORDING
Audio recording is a part of this research study. You can choose whether to give permission to be recorded. If you decide that you don’t wish to be recorded, you will not be able to participate in this research study.

_____ I give my consent to be recorded _______________________________ Signature

Who can answer questions about this study?
If you have any questions about taking part in this research study, you may contact the principal investigator, Christy O’Connor (tel: 610-217-5804. email: cjg2117@columbia.edu). You may also contact her faculty advisor, Prof. Eleanor Drago-Severson (tel: 212-678-4163).

If you have questions or concerns about your rights as a research subject, you should contact the Institutional Review Board at Teachers College, Columbia University (tel: 212-678-4105. email IRB@tc.edu). Alternatively, you may write to:

IRB
Teachers College, Columbia University,
525 W. 120th Street, New York, NY 10027
The IRB is the committee that oversees human research protection for Teachers College, Columbia University.
Statement of Participants’ Rights

1) I have read and discussed the informed consent with the researcher. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.

2) I understand that my participation is voluntary. I may refuse to participate or withdraw participation at any time without penalty.

3) If, during the course of the study, significant new information develops or becomes available which may relate to my willingness to continue my participation, the investigator will provide this information to me.

4) Any information derived from the research study that personally identifies me will not be voluntarily released or disclosed without my separate consent, except as specifically required by law. De-identified data may be used for future research studies, or distributed to another researcher for future research without additional informed consent from you (the research participant or the research participant’s representative).

5) I have been given a copy of the informed consent document for my own records

My signature indicates that I agree to participate in this study

Print Name: ______________________________

Signature: _____________________________ Date: ______________

Researcher’s Name: Christy Joswick-O’Connor

Researcher’s Signature: Christy Joswick-O’Connor Date: 6/13/19
Appendix Q: Survey Informed Consent and Statement of Participant Rights

INFORMED CONSENT FOR TEACHER SURVEY PARTICIPANTS

Study Title: The Experiences of Teachers in a Developmentally Intentional Leadership Institute

Principal Investigator: Christy Joswick-O’Connor, Doctoral Student, Teachers College, Columbia University (tel: 610-217-5804)

IRB Protocol #: 19406

Introduction
You are invited to participate in this research study, The Experiences of Teachers in a Developmentally Intentional Leadership Institute. You qualify to take part in this research study because you work in the [redacted] Approximately 90 teachers will participate in this study and it will take 20 minutes of your time to complete.

Why is this study being done?
This study seeks to understand i) the challenges teacher face, and ii) to understand how (if at all), participation in a developmentally intentional leadership institute has supported teacher leaders in managing these challenges. Some teachers in the district participated in the teacher leader institute and some did not. I am interested in learning about how both those teachers who did not participate in the institute and how those who did describe their challenges.

What will I be asked to do if I agree to take part in this study?
If you decide to participate, you will fill out an 18-question online survey. The survey will take at most 20 minutes to complete. On the survey, you will be asked to respond to questions about your teaching experiences and the challenges you face as a teacher. You will also be asked if you participated in the teacher leader cohort.

What possible risks and/or discomforts can I expect from taking part in this study?
This is a minimal risk study, which means the harms or discomforts that you may experience are not greater than you would ordinarily encounter in daily life while talking about experiences in
your workplace. However, there are some small risks to consider. You might feel discomfort responding to survey questions regarding any difficult workplace experiences that may have arisen for you. However, you may skip any question that you do not wish to answer and you do not have to divulge anything you do not want to address. You may stop participating in the study at any time without penalty.

Please note that this survey is completely confidential. Your email address will be collected but stored separately and your answers and responses will not be connected to you – not by your colleagues, not by your supervisors and not even by the researcher. In order to minimize the effect of taking you away from teaching activities, this survey is scheduled during a faculty meeting.

**What possible benefits can I expect from taking part in this study?**

There is no direct benefit to you for participating in this study.

**Will I be paid for participating in this study?**

You will not be paid to participate. There are no costs to you for taking part in this study.

**When will study be over? May I leave the study before it ends?**

For most participants, your involvement in the study will be over upon completing the twenty-minute survey. Those who took part in the teacher leadership program will be invited to participate in an interview in a few weeks. Any participant may seek to discontinue their participation at any time.

**What protections are there for my confidentiality?**

Any electronic or digital information will be stored on a computer that is password protected. Regulations require that research data be kept for at least three years, after which time the raw data will be destroyed.

For quality assurance, the study team, the study sponsor (grant agency), and/or members of the Teachers College Institutional Review Board (IRB) may review the data collected from you as part of this study. Otherwise, all information obtained from your participation in this study will be held strictly confidential and will be disclosed only with your permission or as required by U.S. or State law.

**How will the results be used?**
The results of this study will be published in my doctoral dissertation, and may be further published in journals and conference presentations. This study is being conducted as part of the dissertation of Christy Joswick-O’Connor, a doctoral student at Teachers College, Columbia University.

Who can answer questions about this study?

If you have any questions about taking part in this research study, you may contact the principal investigator, Christy O’Connor (tel: 610-217-5804, email: cjj2117@tc.columbia.edu). You may also contact her faculty advisor, Prof. Eleanor Drago-Severson (tel: 212-678-4163).

If you have questions or concerns about your rights as a research subject, you should contact the Institutional Review Board at Teachers College, Columbia University (tel: 212-678-4185, email IRB@tc.edu). Alternatively, you may write to:

IRB
Teachers College, Columbia University,
525 W. 120th Street, New York, NY 10027

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Statement of Participants' Rights

1) I have read and discussed the informed consent with the researcher. I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.

2) I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.

3) I understand that my participation is voluntary. I may refuse to participate or withdraw participation at any time without penalty.

4) If, during the course of the study, significant new information develops or becomes available which may relate to my willingness to continue my participation, the investigator will provide this information to me.

5) Any information derived from the research study that personally identifies me will not be voluntarily released or disclosed without my separate consent, except as specifically required by law.

6) De-identified data may be used for future research studies, or distributed to another researcher for future research without additional informed consent from you (the research participant or the research participant's representative).

7) I have been given a copy of the informed consent document for my own records.

By clicking "I agree," you agree to be in this study and confirm you are over 18 years old and work in the Florham Park School District. My signature indicates that I agree to participate in this study.
Appendix R: Preliminary and Final Coding Lists

Preliminary Codes

1. Learning
   • Growth
   • Change
   • Different
   • Reflection
   • Goal setting

2. Challenges
   • Adaptive Challenge
   • Technical Challenge
   • Mixed Challenge
   • Problem
   • Barrier

3. Learning-Oriented Leadership
   • Holding Environment
     o Cohort
   • Support
   • Mentoring
   • Teaming
   • Leadership Role/Responsibility
   • Collegial Inquiry

4. Influence
   • Self Awareness
   • Developmental Diversity
   • Developmental strategies
   • Examples of Teacher Leadership
   • Impact on school/district
Final Coding List
Key Terms and Preliminary Codes

Learning
- Growth
- Change
- Reflection
- Self-Awareness/Vulnerability
- Shift in Perspective

Challenges
- Adaptive Challenge
- Technical Challenge
- Mixed Challenge
- Developmental Demands

Learning-Oriented Leadership
- Holding Environment
  - Cohort
- Developmental Strategies
- Developmental Diversity
- Teaming
- Leadership Role/Responsibility

Transfer
- Collaboration
- Speaking Up
- Saying No
- Difficult Conversations
- Empowerment/Fulfillment