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Exploring two classroom teachers' experiences  
as they aspire to become literacy instructional leaders

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**Abstract**

Exploring two classroom teachers' experiences  
as they aspire to become literacy instructional leaders

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Classroom teacher leadership has encompassed both formal and informal leadership roles—from organizational roles, such as department head, to instructional roles, such as literacy coach or facilitating a book study group. In an era of Race to the Top and challenging economic times, states like Washington have revised their teacher evaluation systems to include instructional leadership. New administration evaluation systems require administrators to demonstrate how they are developing and supporting teachers to become effective instructional leaders. In this study, I document how two teachers participating in a district-developed literacy-reform initiative enhanced their own literacy classroom instructional practice and became instructional leaders for their peers. Using Mangin's framework on distributed leadership, I examine how districts, schools, and teachers can shape the process of developing classroom teacher leaders and ultimately enhance literacy instruction for students.

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## Chapter 1: Introduction

As a school administrator, I have struggled alongside my principal colleagues to prioritize being a leader who is focused on learning and instruction and not just managing. Given the demands placed upon principals to ensure that student learning is foundational to the work we do in schools, it is essential that instructional leadership not rest solely with administrators—it must belong to teachers as well.

In the political context of the federal Race to the Top legislation and efforts at instructional reform, Washington State, like many states across the nation, is writing legislation that requires districts to enhance instructional practice and provide evidence of student growth. Washington State legislation (SB 6996) requires districts to create and implement evaluation tools for teachers and principals that support the use of student growth data. In response to this legislation, districts are investing resources to develop the instructional leadership capacity of classroom teachers. To gain the highest rating on the evaluation tools, teachers are required to work collaboratively to analyze student data to enhance their own instruction as well as the instruction of their peers. Evidence is required that substantiates their role as a data-driven instructional leader in their schools. Both teachers and administrators are required to provide evidence of how they are influencing student growth and how they are participating and influencing the professional learning community in their schools. For example, one of the criteria on the Seattle Public Schools teacher evaluation rubric requires teachers to participate in a professional learning community. "Proficient" is defined as:

Sharing instructional strategies and student data on a regular basis with colleagues, as part of a Professional Learning Community (PLC) and/or other faculty communities.

To show they are innovative—the highest marking on the rubric—a teacher would need to show evidence of:

Makes a substantial contribution to the professional community and to school and district events and projects, and assumes a leadership role among the faculty. Teacher continually shares instructional strategies and student data with colleagues and takes a leadership role in helping others use student data to shape their instructional practice, fully participates in their Professional Learning Community (PLC).

The expectation that teachers serve as active instructional leaders suggests that we need to learn more about how they become leaders and the roles they assume. While there is extensive literature on some aspects of school leadership, such as structures, programs, and processes related to instructional change (Elmore, 2005; Knapp, McCaffrey, & Swanson, 2003; Togneri & Anderson, 2003), how school administrators become instructional leaders (DuFour & Marzano, 2009; Fullan, 2002; Hargreaves & Fink, 2006; Togneri & Anderson, 2003), and how teachers take on special leadership roles (Smylie, 1995; York-Barr & Duke, 2004), less research has focused on the process by which classroom teachers become instructional leaders and learn to lead from the classroom without formal leadership roles or titles.

Gaining a deeper understanding of how, within a school context, teacher leadership develops is vital for the creation of opportunities for teachers to enhance their leadership skills and support their success. To inform district and building administrators about teacher leadership as a means of instructional reform, this study explores the experiences of two classroom teachers as they aspire to enhance their literacy instructional practices and become teacher leaders. Observations and interviews allow for a window into the specific contextual factors that shape the teachers' development, the tools they use to deepen their own practice and to become leaders,

and how these factors influence the teachers' thinking and leadership experiences. The following questions, drawn from Mangin's (2006) framework, guide this study:

1. What is the context (structure, culture, roles, and relationships) in which these two teacher leaders are learning and working?
2. What processes do the teachers use as they engage as learners and aspiring instructional leaders?
3. How do these processes and contexts contribute to changes in the teachers': (a) knowledge, (b) instructional practice, (c) strategies to lead professional development, and (d) beliefs about knowledge, instructional practice, and strategies to lead professional development?

## Chapter 2: Review of Literature

This section presents a selected review of the research on teacher leadership as a professional-development initiative and means of instructional reform and is organized into two sections: First, what is teacher leadership? And second, what are the barriers and supports to developing teacher leadership?

### *What is Teacher Leadership?*

A teacher leader, for the purposes of this paper, is defined as an individual in a non-supervisory, school-based, instructional leadership role. The leader builds instructional capacity aimed at increasing student learning and achievement through interactions with his/her colleagues, principals, and other members of the school community (Mangin & Stoelinga, 2008; York-Barr & Duke, 2004). In this role, teacher leaders have the potential to impact professional learning communities that influence other teachers, to contribute to the development of instructional materials and strategies, and to enhance student achievement (Spillane, Halverson, & Diamond, 2001).

Stoelinga and Mangin (2010) argue that two trends in education have resulted in a conceptualization of teacher leadership: (a) the effort to professionalize teaching and (b) the focus on academic accountability and increased attention to instructional quality. Because of these trends, teachers are being recognized as a source of knowledge and a means of influencing instructional change—both their own and that of their colleagues. These foci in educational reform have led researchers to examine the different roles that teachers can assume as leaders. The next section will outline what prior researchers have learned about these roles.

In a comprehensive literature review about teacher leadership, York-Barr and Duke (2004) concluded that the roles and functions of teacher leaders overlap three categories: organizational, professional development, and instructional development. Within these categories, teachers are able to influence their peers and schools in a variety of ways. For example, teacher leaders may be union representatives who advocate for fellow teachers and facilitate conversations that involve contractual issues. They may also serve as representatives on leadership-building teams or department heads who make decisions regarding the school calendar, direction of professional development, and other structural and organizational issues. All of these roles influence children and schools. However, for the purpose of this paper, it is important to differentiate these teacher leadership roles from those roles that more directly influence instruction. Classroom-teacher leadership that is intended to directly impact instruction can be divided into three categories: model, facilitator, and mediator.

Teachers can influence the instructional development of their peers when they serve as a model or as an exemplar. The most knowledgeable individual is no longer assumed to be an administrator or outside consultant. Instead, classroom teachers can influence instructional reform by sharing with their peers how to develop thoughtful curricula and instruction that incorporates high standards. Teacher leaders can model how to critically and continuously reflect on and in their own practice (Darling-Hammond et al., 2005; Lieberman & Miller, 2004; Schon, 1987). They may also provide formal and informal professional development opportunities for their colleagues by deprivatizing their practice and modeling instruction for others to view. Opening up one's practice for others to observe allows for both the model and observer to learn within the context of the classroom. This is in contrast to theoretical conversations held outside of school and classroom contexts.

Another role the classroom teacher leader can serve is facilitator. As facilitators, teachers can offer a peer's perspective and initiate conversations related to instructional development, creating formal and informal professional-development opportunities. As facilitators, they influence the organization's structure, disrupting the traditional top-down method of disseminating knowledge. A facilitator creates a space where expertise does not solely reside with the administration or outside consultants. Instead, classroom teacher leaders bring teachers and administrators together to problem-solve and learn together. Teacher leaders may help to plan study groups, establish long-term partnerships between teachers, and guide teacher collaboration around inquiry and critical reflection on practice (Little, 1993, 1999; Sirotnik, 1990).

Teacher leaders can also function as mediators between the needs and responsibilities of the administration and the needs at the classroom level. Classroom teacher leaders who serve as mediators disrupt the traditional top-down hierarchy. They are influential members of the learning community. Crowther, Kaagen, Ferguson, and Hann (2002) concept of parallel leadership outlines how teacher leaders can share leadership roles with principals to build a school's instructional capacity of the school and build a bridge between administrators and classroom teachers. This allows professional learning to align reform at the national, state, district, or school level with the needs of students and teachers at the classroom level.

As model, facilitator, or mediator, teachers are assuming leadership roles that alter the traditional top-down hierarchy and cellular nature of schools, which have hindered the professionalization of teaching. Assuming any of these leadership roles helps teachers learn and grow while enhancing learning and professional development throughout the entire system. However, these roles are not common in schools and districts across the nation. Teacher

leadership is a complex endeavor shaped by the various contexts in which teachers work and the collaborative process. In the next section I address this complexity by summarizing what prior researchers have identified as barriers to and supports for teacher leadership.

### *Barriers to and Supports for Teacher Leadership*

Teachers work and interact in a variety of contexts and under a variety of conditions that mediate the outcome of their learning, their students' learning, and their development and work as instructional leaders. As established by York-Barr and Duke (2004), these conditions and contexts can be interrelated and therefore classified in more than one category; in practice, they are not likely to be separated meaningfully. Nevertheless, I will use the authors' approach to categorize and discuss key facilitators and obstacles to teacher leadership. Two organizational structures that support teacher leadership are (a) site-based management, in which teachers participate in decision making, and (b) providing time, space, and access required to collaborate with peers. In addition, there are contractual factors that support the enactment of teacher leadership. For example, contractual language may state that all teachers are responsible for learning and leading.

Conversely, the barriers to teacher leadership include (a) organizational factors, such as top-down management systems; (b) social relations and tensions, such vagueness about the decision-making process; (c) practices that intentionally or unintentionally promote teacher isolation; and (d) contractual factors, such as lack of incentives to lead. The next section will explore the barriers to and supports for teacher leadership by dividing them into three conceptual clusters: *structures, culture, and roles and relationships*.

*Structures.* Historically, teachers have worked in isolation within a top-down hierarchical structure (Lortie, 1975), which is a barrier to classroom teachers' assumption of leadership roles.

Teachers cannot influence instructional reform if administrators determine the direction that teaching and learning will take, and if teachers are not encouraged to collaborate and learn alongside their peers. If teacher leadership is to be supported, these hierarchical structures must be replaced by ones that support collaborative professional development opportunities (Darling-Hammond et al., 2005). How resources are allocated, decisions as to what and how content is taught, and organizational structures and contractual factors all influence whether teachers will assume leadership roles and take part in professional development initiatives. Efforts to change this traditional hierarchical structure include providing teachers with opportunities to utilize their expertise through modeling, facilitation, and/or mediation. In addition, the hierarchical structure's influence can be diminished by supporting teachers to engage in inquiry and reflection (Elmore & Burney, 1997; Holmes Group, 1990). Inquiry and reflection can be fostered in Professional Learning Communities (PLCs), where responsibility, power, and expertise are distributed among teachers (DuFour & Marzano, 2009; Little, 1993). Understanding the structural context in which learning and leading occurs is the first layer of unpacking teacher leadership. Prior researchers have found that whether teachers take advantage of structures in place is influenced by the culture of the professional learning environment (York-Barr & Duke, 2004).

*Culture.* The success of initiatives, including teacher instructional leadership, is largely influenced by school and district culture. Studies have found that the social relations and tensions, cultural norms, and district history will ultimately shape the success of teacher leadership or any instructional-reform initiative (York-Barr & Duke, 2004). York-Barr and Duke (2004) summarized the facilitators of school culture that influence teacher leadership. They found that a culture with a system-wide focus on learning, inquiry, and reflective practice—as

well as expectations of shared decision-making and encouragement to take initiative—facilitates teacher leadership. Additionally, cultures that value teacher leaders as positive models for the teaching profession and strong teacher communities that foster professionalism also enhance teacher leadership.

Interdependent with structures in an organization, cultural beliefs, norms, and expectations influence the interaction between administration and teacher leaders and between teacher leaders and their peers. They also influence teachers' expectations for themselves as professionals. In a culture of shared decision-making between administration and teachers and support for questioning practice, teacher leadership, learning, and growth can occur. Overall, positive professional relationships and peer networks are essential for teachers to be effective leaders and for learning to be facilitated among peers (Achinstein, 2002; Crowther, Kaagen, Ferguson, & Hann, 2002; Elmore, 2005; Little, 1993; Silva, Gimbert, & Nolan, 2000).

*Roles and Relationships of Teacher Leaders.* In the realm of professional learning, classroom teachers are in a unique position to navigate being perceived by their peers as both learner/participant and teacher/facilitator. This is a role that is distinct from that of a coach. To take on these roles, however, teacher leaders need support from their principals as well as structures in place that will allow them to assume a role that can lead to instructional change. Depending on the relationships that are established, the process of interaction will differ. The different roles teacher leaders assume and relationships they build will impact the type of interaction they have with others and the learning they engage in.

Prior research has found that relationships with peers and administration can facilitate or hinder teacher leadership. Crowther and his colleagues' (2002) concept of parallel leadership outlines how teacher leaders share leadership roles with principals to build the instructional

capacity of the school. Through parallel leadership, teacher leaders function as mediators between the needs and responsibilities of the administration and the needs at the classroom level. This allows for professional learning to be aligned with larger reform efforts coming from the nation, state, district, or school level and with the needs of the students and teachers at the classroom level (Crowther et al., 2002). Additionally, research has demonstrated that the collaborative work that teachers engage in should allow for informed dissent, where teachers are free to question—and, at times, disagree—thereby challenging each other to learn and grow (Achinstein, 2002; Little, 1993).

Morgolis (2009) followed five teachers to examine their motivation to take on leadership roles and found that when structures were in place to foster relationships among teachers, they were encouraged to increase their own learning and the learning of peers. In addition, the teacher leaders had significant capacity to influence instructional change. The process of improving their own practices and influencing their peers was dependent on their own learning and confidence in both their abilities and their relationships with their peers. Evidence further indicated that both teacher leaders and those they led became more responsive to self-reflection and open to instructional change guided by student outcomes.

Silva, et al. (2000) conducted a case study that indicated the need for teacher leaders to have the ability to nurture relationships to navigate the structures of schools, model professional growth, encourage change, and challenge the status quo. The Silva study outlined the importance of opportunities for teacher leaders to learn and build relationships that support them in attaining a more global perspective. This entails looking beyond what teachers face in their individual classrooms and toward what is needed at the school and district levels. It is beneficial, therefore, to know how to navigate the organizational structures and barriers that may arise in a large

system. This underlines the importance of building relationships with administration at the school level to create a culture of shared decision-making and leadership, as well as the relationships with peers to encourage learning and change.

The roles and relationships that teacher leaders assume are another aspect of the context in which teacher leaders learn and work. Studying the complexity of this context allows for a more accurate understanding of teachers' experiences as they aspire to become instructional leaders. This is an important aspect of the development of classroom instructional leaders, because classroom teachers who navigate leadership roles at the district, school, and classroom level provide a potential connection between district, school, and classroom learning.

The context of a school or district includes structures, culture, and teachers' roles and relationships. The structures and norms among teachers and administration and among teachers and their peers in PLCs, as well as the beliefs and expectations of what it means to be a professional within the school context, affect learning and instructional reform. The context can play an important role in creating learning environments that differentiate a gathering of teachers from deep transformational learning in a PLC, resulting in instructional transformation (Achinstein, 2002; Grossman, Wineburg, & Woolworth, 2001; Lord, Cress, & Miller, 2008; Smylie & Evans, 2006)

### *The Need for Research*

Examining teachers who are in the process of becoming instructional leaders within the realities of district, school, and classroom contexts has the potential to inform our understanding of classroom teacher instructional leadership. Mangin's (2006) conceptual framework, based on distributed leadership (Mangin, 2006; Spillane, Halverson, & Diamond, 2004), takes into account the complexity of studying how teachers become leaders. This framework provides a

structure for examining how processes and context (specifically, structure, culture, and roles and relationships), influence classroom teachers as they aspire to be instructional leaders.

### Chapter 3: Conceptual Framework

Understanding the multiple and complex contexts and processes teacher leaders engage in can inform efforts to support classroom teacher leadership and professional development initiatives. Building on distributed leadership (Spillane et al., 2004), Mangin (2006) conceptualizes the development of classroom teacher leadership in regard to process, contexts, and outcomes. In this section I will briefly summarize the theory behind distributed leadership, explain Mangin's framework, and demonstrate why this framework is an appropriate tool for understanding how teachers become leaders.

#### *Distributed Leadership*

Distributed leadership provides a useful conceptual framework for understanding the complexities of teacher leadership. Spillane and colleagues (Spillane et al., 2001) developed the distributed theory of leadership to go beyond identifying *what* processes are necessary for instructional change and explore the *how* and *why* of leadership activity. Drawing on activity theory and distributed cognition, the authors examine the "social context" of leadership development. According to these researchers, the individual and the environment are interdependent, so the unit of analysis when studying leadership practice should be the social context, including the interaction among the actors, artifacts, and situations. Furthermore, the distributed perspective posits that leadership is grounded in both macro functions and micro tasks. This means that although it is important to analyze the large-scale organizational tasks (e.g., constructing and selling a vision, building norms of trust, monitoring and evaluating instruction, etc.), restricting analysis to those types of macro functions limits access to the practice of leadership. To begin to separate the "how" from the "what" of leadership practice, it

is important to identify and analyze the micro tasks that contribute to these macro functions. The objective of using a distributed leadership framework is to understand connections among macro functions and micro tasks. Spillane et al. further posit that it is important to both observe practice and ask practitioners about the observed practice. The distributed perspective does not provide directions on what to do, but offers a tool for helping leaders to think about and reflect on their leadership practices and for researchers to study these practices. Utilizing this theory as a foundation, I modified Mangin's (2006) theory of action to analyze teacher leadership practice (Figure 1).

Mangin's (2006) framework (Fig. 1) outlines three facets of analyzing and documenting the micro tasks involved in instructional teacher leadership: enactment within multiple contexts, conditions influencing enactment or the processes of interaction, and the intended benefits or possible outcomes of teacher leadership. Enactment of teacher leadership occurs within multiple contexts: the district, social relations and tensions, cultural norms, available resources, curriculum, role design, organizational structures, and contractual factors. The process of interaction is characterized as increased dialogue, resource sharing, and deprivatized practice. The interaction, as noted in the center circle of Figure 1, could be between teacher leader and one or more than one of their peers or as a facilitator where other teachers are collaborating. The teacher leader serves as an instructional resource on topics such as curriculum standards, instructional strategies, assessment strategies, and subject matter. The intended possible outcomes of interactions within these contexts include new knowledge and beliefs, instructional improvement, student learning, collective improvement, internal accountability, and PLCs. To gain a deeper understanding of how process and context influence outcomes, the next section will further explain process and context.

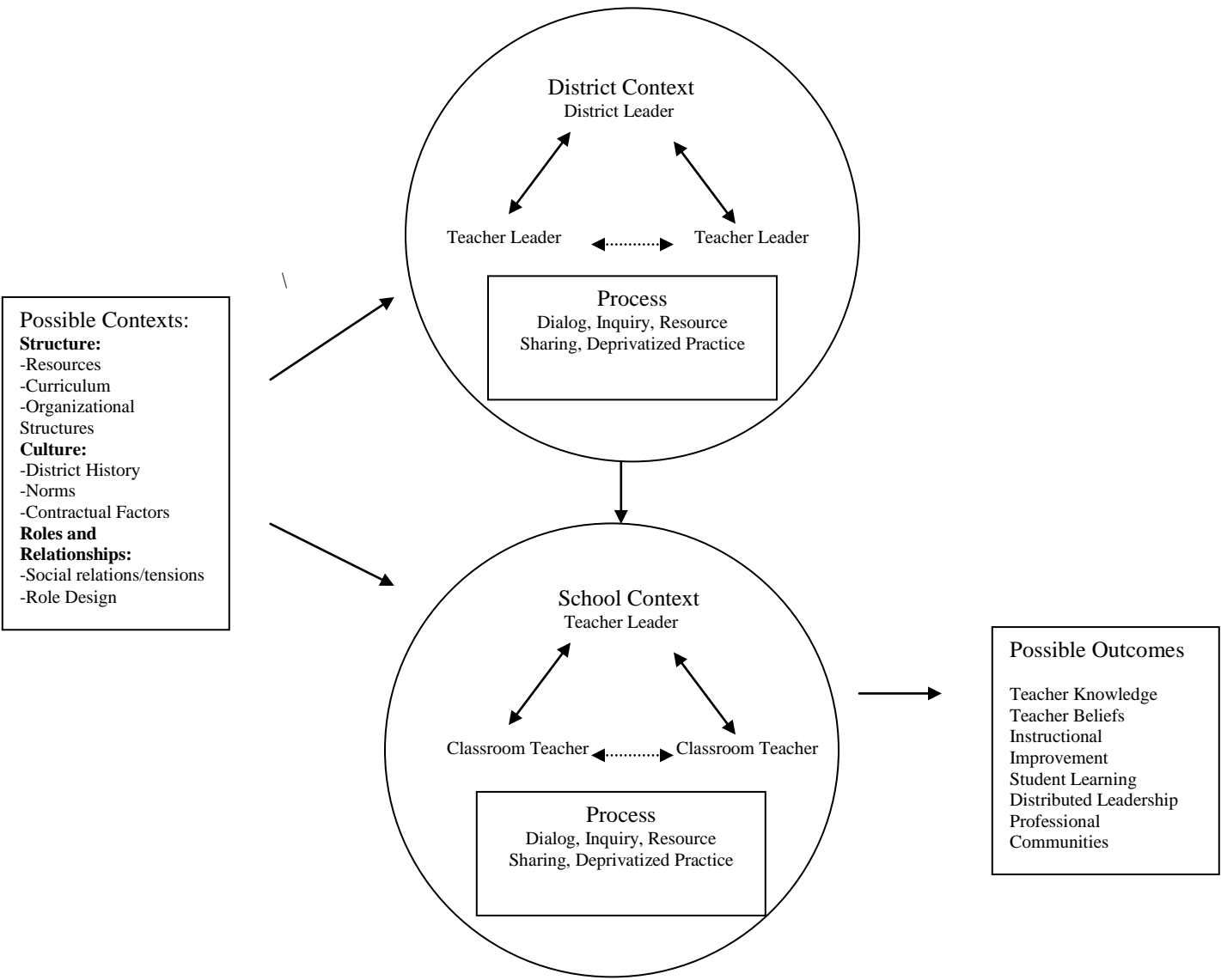


Figure 1. Conceptual framework for instructional leadership depicts the influence that district has on the processes and outcomes that occur for the teacher leaders at their schools

Teacher leaders engage in a variety of processes that facilitate learning for both themselves and their peers. During social exchanges, these processes are not always isolated or easily compartmentalized. *Dialogue* is a process in which individuals come together to exchange ideas. *Inquiry* is where teachers pose a question or hypothesis and test their assumptions, using

student work as evidence. *Resource sharing* is where teachers share different lesson ideas or materials. *Deprivatize practice* happens when teachers open up their classrooms to other teachers or visit other teachers to share and, possibly, model instructional practices and pedagogy; sometimes these opportunities result in sharing observations with the classroom teacher. An example of how these practices can overlap is during a debriefing meeting after a teacher models a lesson for peers, in which teachers may offer resources to support or enhance the lesson. Another example of the blur among these processes is inquiry and deprivatizing practice; teachers may acquire data through visiting each other's classes and sharing their observations during a post-observation meeting. The processes teachers engage in and outcomes that result are further influenced by the contexts in which teacher leaders work.

In studying the processes that teachers engage in as instructional leaders, it is important to look beyond the activity and delve deeper into the context in which teachers are attempting to lead. Research suggests that emotional and social interactions have a significant influence on teacher instructional leadership (Morgolis, 2009). I have organized Mangin's (2006) contextual framework into three categories based on what prior research has found to contribute to the success of and barriers to teacher leadership: structures, culture, and roles and relationships. I define *structure* to include organizational structures—who is in charge of what—but also include the resources and curriculum available to members of the organization, because they also affect how the structure is supported and constructed. The second category, cultural factors, includes district history, cultural norms, and contractual factors. The third category, roles and relationships, includes social relations and tensions within a group and how the different roles are designed for members of the group.

In addition to organizing the contexts into the three categories, I also differentiate the processes that occur at the district level from the processes that occur at the school level. However, the district's professional development context and experiences resulted in outcomes that in turn influenced the processes that the teachers engaged in at their individual schools. To understand the learning and leadership outcomes for teachers in the study, it is important to investigate both what is occurring at the district level (top circle) and its effects—as illustrated by the arrow pointing to the second circle and the processes and outcomes at the school level.

These contexts can either create barriers to instructional leadership or provide support and influence teachers to lead, engage, and feel safe with others in dialogue, inquiry, and deprivatization. The framework outlines the importance of examining context and process to understand the complexity of achieving various outcomes of teacher leadership. Situating my study in this framework will inform how we understand the process by which a classroom teacher becomes an instructional leader.

## Chapter 4: Research Methodology

To gain an understanding of how, within the context of a district professional development initiative, aspiring classroom teacher leaders learn and develop, I used qualitative methods to observe and analyze two case studies. Case studies are useful in addressing “how” and “why” questions (Stake, 1994; Yin, 2003).

My role was mainly one of a participant observer (Jorgensen, 1989) in my position as an intern with the director of Elementary Curriculum and Instruction, who was also the district leader for the Collaborative Literacy Project (CLP). In my role as intern, I was asked to help the district assess the impact of CLP—specifically, what teachers were taking away from the professional development initiative: How were their teachers changing, if at all, into instructional leaders in their buildings? As an intern, I attended district-level planning meetings, which allowed me to understand the objectives that district leadership had set as goals for classroom teachers. When I interviewed teachers and attended professional development sessions, my observations were influenced by my participation in district-level meetings. In addition, due to my background in literacy instruction, I was able to participate as an equal contributor to conversations related to literacy instruction.

### *Setting*

Evergreen School District<sup>1</sup>, a mid-sized suburban school district<sup>2</sup> in Washington State consisting of about 20,900 K-12 students, was the district selected for this study. At the time of the study, according to the Office of the Superintendent of Instruction for Washington State,

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<sup>1</sup> “Evergreen” is a pseudonym.

<sup>2</sup> Evergreen is located about 20 miles outside a major metropolitan area and includes 21 K-5 and three K-8 elementary schools.

Evergreen's demographics were 65% White, 14% Asian, 10% Hispanic, 6% Black, 4% multicultural, and 1% Native American. Twenty-seven percent of the students qualified for free or reduced-price lunch, 13% qualified for special education, and 9% were transitional bilingual. Seventy-five percent of the students graduated on time, and 100% of the teachers met the No Child Left Behind Act criteria for highly qualified.

### *Historical Context of the Collaborative Literacy Project*

After examining state standardized assessments, talking with principals and teachers, conducting classroom observations, and documenting a lack of steady growth in student reading achievement, district administration decided to undertake a district-wide focus on literacy instruction. The stagnant growth in reading for the previous five years, as well as a discrepancy in scores between students of color and their White peers, created a sense of urgency during the era of No Child Left Behind. Through observations and interviews it became apparent that there was no clearly articulated and uniformly understood definition of effective practices in literacy instruction across the district. This lack of consistency and clarity made it difficult to create a plan to support district-wide literacy learning. District administration was tasked to create a model of professional development that supported enhanced literacy instruction, clear direction, and leadership at the elementary level. The district's foundational question was, "How do we effectively build leadership capacity for improved literacy instruction?"

District leadership examined what research has shown about best-practice professional development and literacy teaching and learning. Working with various stakeholders in the Evergreen community, administrators called on the expertise of local universities and current research, as well as the guidance of Regie Routman, a national literacy educator, to help create a vision, plan of action, and learning expectations for what students should know and be able to

do. Objectives were created for student learning, teacher practice, school practice, and district practice. These goals and foci guided the creation of the district's CLP, which identified the actions required to enhance literacy instruction in Evergreen.

The assumption of the CLP's theory of action was that building leadership capacity in literacy instruction for principals, classroom teachers, and coaches would result in enhanced student learning. Guided by this theory of action, Evergreen wrote grants and allocated district funds totaling approximately \$900,000 for a five-year period.

For three years, Evergreen focused their elementary literacy instructional reform on two major foundational targets: teaching for understanding in literacy and developing a collaborative culture (Drew, 2005). To address the first target, the professional development initiative provided in-depth study for teacher leaders, principals, district literacy coaches, and administrators in the Readers and Writers Workshop. Work from literacy experts such as Lucy Calkins, Katie Wood Ray, and Regie Routman guided their learning. CLP also provided professional development in assessment and instructional practice with consultation from Rick Stiggins, an expert in student outcome driven instruction. The CLP was designed to address the second target, the creation of a collaborative culture. The expectation for the CLP was that teachers, specialists, and administrators would learn side by side in collaborative groups, both in and out of schools and classrooms. Building on these two foundational beliefs, the district was interested in developing a professional development model that would effectively increase the leadership capacity of teachers and administrators for improved literacy instruction in all elementary schools across the district.

Participants in the CLP were asked to be instructional leaders in their buildings. Teachers were expected to create and facilitate learning communities with their peers to further explore the

literacy instructional practices that were occurring at the school level. The content covered in the district professional development sessions and school-level learning groups was driven by teacher requests stemming from the Readers and Writers Workshop. Participation in a school-level learning group was voluntary and took a variety of forms, depending on the school. Some were grade-specific or topic-specific and had a regular group of participants, while others had a group whose membership changed at each meeting. To accomplish school-level initiatives, district instructional coaches supported the schools, including the principals, teacher leaders, and teachers, by participating in planning meetings with school leaders, attending school-level learning group meetings, and facilitating visits in lab classrooms, where teachers could observe their peers teaching.

In the third year of the project, the objective was not only for teachers to attain a greater knowledge of quality instruction through the workshop models, but to also learn how to be reflective about instruction. As reflective practitioners, the objective was to participate in an inquiry model of self-reflection to enhance their own practice; this would be the first step in learning how to use this model to facilitate learning groups at their own schools.

My focus on the learning that occurred for teachers in the CLP is an interesting for two reasons. First, it is an established professional development model that focuses on improved literacy instruction and enhanced instructional teacher leadership. Second, the district is challenged by an increasingly diverse student population, many of whom do not speak English as their first language. Schools across the district, even those schools that traditionally had extremely homogeneous demographics, now face the challenge of teaching a more diverse student population. Studying teachers in Evergreen School District provided an opportunity to

examine professional development practices in an increasingly diverse school district invested in literacy professional development that focuses on teacher leadership.

Given the tremendous amount of resources that were allocated for the program, the district was interested in assessing the impact of the CLP. The first approach they took was to examine student performance on state reading and writing assessments. Unfortunately, the scores of fourth-grade students remained stagnant, even slightly decreasing over the years of the project (Table 1). The district leadership was disappointed with the results; however, through observations in classrooms and teacher reflections, they believed that the work being done through the CLP was having a positive impact on instruction and student outcomes. Consequently, they wanted to examine more closely the experiences of the teacher leader participants, which is the focus of my study.

Table 1: *Evergreen Fourth-Grade Students Passing the State Reading Assessment*

| Year of CLP | School Year                | Students Passing Reading | Students Passing Writing | % Bilingual | % Free or Reduced Lunch |
|-------------|----------------------------|--------------------------|--------------------------|-------------|-------------------------|
| 1           | 2004-05                    | 79%                      | 63%                      | 7.8%        | 26%                     |
| 2           | 2005-06                    | 78%                      | 61%                      | 7.9%        | 27%                     |
| 3           | 2006-07                    | 77%                      | 60%                      | 8.6%        | 27.5%                   |
| 4           | 2007-08                    | 71%                      | 59%                      | 8.7%        | 26%                     |
| 5           | * Year of Study<br>2008-09 | 73%                      | 61%                      | 9%          | 29%                     |

### *Methods*

I conducted two qualitative case studies of teachers who participated in the CLP and who were expected to take on leadership roles in their schools. Although a qualitative study cannot establish a causal relationship between the professional development of classroom leaders and student achievement, it can provide information that would be helpful in understanding what and

how teachers learn, which in turn would inform how a district could support teacher leaders and possibly enhance professional development efforts.

### *Participant Selection*

To look closely into teacher leader practices, two participants were selected. Maximum variation sampling was employed, which enabled the sample to have both a wide variation and a common point of reference by which to compare the learning across a district. Maximum variation sampling provides a sample of feasible size and represents widely varying instances of the phenomenon (Merriam, 1998). It was essential to select participants that shared common learning experiences but differed widely in how these common experiences translated into implementation. In other words, I selected teachers with similar backgrounds and training who worked in different school contexts. I chose two teachers who had been teaching for 5-7 years, had participated in CLP for three years, and who were currently teaching fourth grade. Both were considered well-respected and strong teachers by district representatives, but differed in the type of school in which they taught. One taught in one of the most homogenous and affluent schools in the district, and the other in one of the most culturally diverse and economically and academically struggling. Both were recognized as leaders in their buildings who had the potential to be not only social leaders, but also instructional leaders for their peers.

### *Data*

To gain an understanding of how two aspiring classroom teacher leaders develop, this multiple-case study examined the context as well as the process (es), tools, and materials utilized during their experiences as participants in CLP. To this end, the following data were collected:

(a) observations of the CLP sessions, classroom instruction, and school-level learning

communities; (b) document review of handouts and curriculum material; and (c) interviews of teacher leaders and district leadership.

### *Observations*

Collaborative Literacy Project sessions, classroom lessons, and small-group, school-based sessions were observed and field notes were gathered and summarized. These observations allowed me to gain a deeper understanding of and common reference point for what the teacher leaders were talking about regarding their practice, student growth, professional development opportunities, and their interactions with the PLCs at their schools.

### *Interviews*

Interviews allow for an understanding of the experiences of others. Interviews were conducted following each learning opportunity to understand how each teacher interpreted her experience in the formal professional learning opportunity. I met with the teachers following their small-group professional learning sessions with the teachers at their schools and after each observation, which followed each CLP session. To ascertain the process and outcome(s) from their experience, I asked three open-ended questions: What did you take away or learn? How, if at all, have you changed your teaching or leadership practice? Why have or why have you not made modifications to your practice? In addition to interviews with the teachers, I also collected interview notes from different key members in the district—as well as the teacher leaders' building principals at the start of the research—to gain a clear picture of the context of the work in the district, schools, and CLP. Information gathered from the interviews provided rich descriptions of the context of the district and participants' experiences.

### *Documents*

A variety of documents were collected and reviewed to gain information on the background and context of the CLP and the district, the processes that were embedded in the CLP that teachers engaged in, and the outcomes of the teachers' experiences. These documents included: (a) the theory of action paper written by the elementary curriculum and instruction director; (b) a dissertation written by the Assistant Superintendent that focused on principal learning as instructional leaders; (c) the CLP outline, mission, vision, goals statements, and agendas from the sessions; and (d) the teachers' end of year reflection papers.

The theory of action paper and the goals and vision statements for the CLP provided a context for understanding the reform initiative and its expected outcomes. The end of the year reflection papers were another means of understanding the teacher leaders' learning beyond what I learned in the interviews. Resources that were shared and agendas from CLP sessions also my understanding of the context in which the teacher leaders were learning and working.

### *Data Analysis*

Analysis of data utilized both inductive and deductive processes. All interviews were audio taped and transcribed and anecdotal notes were taken during all observations. First, using open coding, I developed emerging themes through an inductive process (Coffey & Atkinson, 1996). Through this process, I read transcripts and field notes from interviews, observations, and document analysis to analyze how the different participants responded, specifically looking at evidence of contextual and process factors influencing the teachers. My unit of analysis was the individual teacher leaders within the context of their professional development and school experiences. I examined comments and evidence that referred to the context and processes that the teachers engaged in as leaders. Specifically, I examined interactions among the context and process each teacher engaged in as leader and the outcomes they identified.

The context refers to the environment and culture in which the teacher leaders learn and work. This includes the history of the district/CLP and the school and teacher backgrounds; the different structures in place at the district/CLP, school, and classroom levels; resources available; and the norms and relationships. Process refers to how the teacher leaders interact with others to attain outcomes. These processes include dialogue, inquiry, resource sharing and deprivatization of practice. Outcomes refer to what teachers reflect on as the result of the work they are doing as teacher leaders and participants in the CLP. Outcomes include change in teacher knowledge, change in teacher beliefs, instructional improvement, student learning, distributed leadership, collective improvement, development of PLCs, and internal accountability.

Reviewing the transcripts chronologically, organized into context, process, and outcomes, I looked for themes for each teacher to understand the interaction of factors that influence teacher leadership. Then, I compared and contrasted the two cases. This process allowed me to examine what the teachers were learning over the course of the year, as well as discern the similarities in their learning and experiences. This small sample would not be generalizable across all the teachers in the project, but my findings could be explored in future research.

## Chapter 5: Evergreen's Collaborative Literacy Project

In this study, I examined the contexts in which two teachers worked and learned as they aspired to be instructional leaders, the processes in which they engaged as learners and leaders, and how contexts and processes contributed to their roles as teacher leaders and their practice with students in their own classrooms. To examine how context and process influenced outcomes, I first analyzed the context in which the two teachers learned and worked. I started by examining the district context and then each school context. The analysis of the district context provides the overarching setting in which both these schools and teachers are located. This section includes a description of the contextual factors (structure, culture, and roles and relationships) in Evergreen School District and then discusses the processes that teacher leaders engaged in as they participated in the district CLP professional development project. In the following chapters I analyze each teacher's experiences at her respective school to explore the more immediate local school contexts and processes as well as how the district context and processes influenced the work of the teacher leaders.

### *Evergreen School District Context*

Two important features of the Evergreen School District contributed to the implementation of the CLP: the process of decision-making and the goals of this particular CLP professional development initiative. Together, the district decision-making agreement, entitled Draft 5, and the goals and expectations of the CLP influenced the context in which the two teachers learned and worked over the course of the year. In this section I examine the culture of Evergreen's CLP as influenced by Draft 5, the structures of the CLP—specifically, the theory of action and goals, curriculum, and resources—and the intended roles and relationships that were

expected of all CLP participants. Following the description of these elements of the district context, I investigate how the district context influenced the processes and outcomes for the two teachers.

### *Culture*

Evergreen School District uses a unique district-wide consensus policy to make decisions. This policy, entitled Draft 5, was a result of the superintendent's collaboration with schools and communities following a devastating strike in the 1980s. The fundamental principle in Draft 5 states that those who may be affected by any district-level decision will be invited to participate in the decision-making process. When appropriate, specific guiding questions and consensus-building ideas are also included as components of the model. Under the Draft 5 policy, a variety of important stakeholders, such as teachers, building administrators, and district leaders, were involved as the district administration reviewed literacy practices and designed a plan to enhance literacy instruction.

The Draft 5 document not only impacted the creation of the CLP, but also how it was implemented across the district and at the school level. The principals at both schools in this study, Ocean Vista and Valley View<sup>3</sup>, made reference to how decisions are made “the Evergreen way” and how this affected their leadership at their respective schools. All schools had the option of joining the CLP. Expectations for participants were outlined prior to opting in, and all elementary schools in the district chose to participate; if schools had decided not to participate, they would not have had district support in enhancing literacy instruction. So, in many ways, schools didn't really see nonparticipation as an option, and participation was interpreted as a top-

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<sup>3</sup> “Ocean Vista” and “Valley View” are pseudonyms.

down mandate. Both principals reported the challenge of balancing Draft 5 site-based decision-making with the top-down expectations of CLP participation.

Both principals actively participated by attending sessions and, in their own way, supported CLP work at their schools. However, they both believed that the CLP was in some ways in conflict with Draft 5 and the culture of the “Evergreen way.” Ocean Vista’s principal, a veteran at Evergreen, noted that while she appreciated and enjoyed the CLP initiative and supported and believed in Draft 5, there seemed to be a slow shift in district culture away from Draft 5 principles. She especially appreciated the collaborative learning opportunities in which teachers and administration learn side by side, and noted the importance of Draft 5 and shared decision-making regarding the implementation of CLP requirements. However, she also mentioned the struggle to find the time for school-based initiatives and decision-making in a system that seemed to be moving toward more of a top-down decision-making model, and said, “There seems to be a ‘shifting’ movement toward central decision-making. Having to get used to not having complete autonomy is something different.”

Valley View’s principal, new to the district and to the role of building administration, also expressed her struggle with Draft 5 and the CLP. She viewed the district norm of collaborative decision-making set forth by Draft 5 and the immediate expectations set forth when a school opted into CLP as contradicting each other. As a new principal who was trying to gain the trust of her staff, the task of balancing shared decision-making with top-down district expectations was overwhelming:

Things move slowly. There is no time to implement Draft 5 with staff when there are so many district initiatives being sent down to the principals. There seems to be a contradiction within the district message—individualistic vs. district lead. (Name, date)

The expectations of Draft 5 were clear, but consistent implementation when Evergreen's new CLP initiative necessitated immediate implementation posed a challenge, especially for a new administrator.

### *Structure of Evergreen's CLP*

The CLP's structure and curriculum were guided by the intended outcomes for students, teachers, schools, and the district. The theory of action paper written by the elementary curriculum director (Drew, 2005) proposed that student outcomes in literacy would improve if teachers who were learning and working collaboratively with peers and administration taught students thinking strategies through the workshop model. Fundamental to the theory of action was that collaboration and continual learning are the common threads that influence teacher learning and, ultimately, lead to improved student learning. To support and accomplish these goals of enhanced literacy instruction and learning, the district's theory of action focused on three main strands: overall structure of professional learning, professional learning communities, and curriculum and instructional practices<sup>4</sup>. In the next section I will describe each, followed by an explanation of the resources the CLP and Evergreen put in place to support their implementation.

*Structure of Learning.* The structure of CLP professional development in the district consisted of creating dedicated time for learning content, implementation, and building PLCs; furthermore, the district expected that everyone would participate, including administration, teacher leaders, and teachers. During the five 3-day sessions, principals and teachers spent one day deepening their knowledge of content and the next two days observing focus lessons taught

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<sup>4</sup> The theory of action and goals are taken from a report completed by the district's elementary director of curriculum and instruction as an inquiry project for the University of Washington in 2005 (Drew, 2005).

by teachers attending the CLP sessions. The expectation for participants in the CLP was for them to model instructions through “classroom labs.” The focus lessons observed during the three-day CLP sessions helped to translate the work and learning the teachers were experiencing at the district-level training to teachers’ classrooms at the school level. If a teacher did not have the opportunity to host a CLP class lab, he or she could invite peers from their building or even from around the district to observe their students and classroom teaching. The intended outcome was to provide an opportunity for teachers to see other instructional practices and for the model class-lab teacher to discuss, reflect, and get feedback from peers about what they were doing with their students. Class labs followed a protocol in which the classroom teacher named the problem of practice, the small observation group (i.e., PLC) came up with a list of student classroom behaviors to look for that addressed the problem of practice, and, finally, the PLC group debriefed after the observation.

Throughout the year, the teacher leaders at each school were expected to facilitate another small PLC group of peers. The expectation was that the CLP teachers would share with their peers the learning about literacy they had gained through their CLP sessions. The individual CLP teachers selected the specific format and content of what was explored, so it was unique to each building. Principals were invited to join these groups. The expectation was that lessons and protocols used as models during the district meetings could be utilized at the school level when principals and teacher leaders brought ideas back to their buildings. The specific expectations at the student, classroom teacher, building, and district levels provided more detail as to how structures were created to support collaboration and continual learning at all levels and will be examined next.

The ultimate goal of the CLP process was for students to improve reading capabilities, develop a love for literacy, and becoming active participants in their own learning. The following summary is taken from the CLP theory of action paper (Drew, 2005):

Goals for the Students: Become thoughtful, active, proficient readers who are aware of their own thinking as they read; read with higher levels of comprehension; utilize comprehension strategies to manage complex reading tasks; write with higher quality; become life-long learners who read and write.

These goals moved expectations beyond increasing comprehension skills and reading scores to promoting literacy as a life skill by which students take ownership of their learning. Expectations for students to be metacognitive about their reading—“aware of their thinking as they read”—also pushed beyond simple comprehension. For some students these processes come naturally, but struggling readers need instruction on how to stop and make connections or ask questions about the text. It follows that teachers need to know how to teach all students to be metacognitive and to engage with complex reading tasks. Therefore, the following summary of CLP goals for teacher knowledge and practice outline the next layer of learning (Drew, 2005):

Goals for Teacher Practice: Create learning environments that focus on time, ownership, response and community; understand and implement workshop model to support students’ thinking and individual needs; understand cognitive processes proficient readers use to deepen comprehension of text; develop units of study focused on providing explicit and in-depth instruction of comprehension strategies; design lessons that provide high degree of modeling and support and gradually release the responsibility of learning to students.

To accomplish these goals, the expectation was that teachers would have the depth of knowledge and ability to manage this complex learning environment. Teachers need to have the knowledge to model and provide “explicit and in-depth instruction” that is “responsive” to individual needs. They also need the skills to create a learning community and a structure in which they teach students to eventually become independent by gradually releasing learning to the student. To support teachers in the implementation and creation of this learning community, Evergreen realized that teachers needed professional development learning opportunities and structures.

*Professional Learning Communities.* The second goal of the theory of action, PLCs, was designed to develop instructional leadership among literacy coaches, who would then provide ongoing side-by-side support as teachers and principals attempted to implement effective literacy practices and guide PLCs at their schools. The theory of action here focused specifically on the “power of talk” for adults and giving teachers the opportunity to share responsibility for teaching and learning by establishing a structure for teacher learning. Through these actions, the goal was for teachers to develop an understanding of what it means to be teacher leaders who support collaborative learning and reflection among other teachers in their schools. The following section from the CLP document outlines the school-level goals for developing teacher literacy leaders and principals who support effective classroom instruction (Drew, 2005):

Goals for School Practices: Lead and guide building professional development focused on effective reading and writing practices; extend and refine the implementation of teacher study groups to positively impact reading and writing instruction; align building resources to support reading and writing; include effective instructional practices in literacy and models for teachers’ learning within school improvement plans.

The goals for school practices outline the need to support teachers' content acquisition and study group opportunities and to include literacy goals and structures in school improvement plans, along with the appropriate resources and time required to attain those goals. Both resource allocation requirements and directives to be incorporated into school improvement plans were contrary to the historical context of site-based management and policies such as Draft 5. To accomplish these goals at the school level, district support was crucial. The following outlines what goals the district believes are necessary to support schools and teachers (Drew, 2005):

Goals for District Practices: Provide on-going, in depth training around effective instructional practices in literacy for principals and teachers; develop demonstration classrooms and learning labs across the district, district wide coaching model that is comprehensive, aligned with literacy goals, and makes a positive impact on student learning; align resources to support principal and teacher professional development to improve student learning.

District goals further aligned with and supported the expectation that learning was continual and occurs in collaboration within a learning community. Similar to expectations of student learning communities and teacher learning communities at schools, the district also supported learning communities across the district. To accomplish learning district-wide, aligning resources, learning opportunities, and coaching for principals and teachers were expectations of district administration. Student learning was at the heart of these goals, with the assumption that student learning occurs only when teachers and administration continue to learn. Therefore, the curriculum selected to accomplish these goals includes the expectation of collaborative continual learning.

*Curriculum and Instructional Practices.* The third goal of the district's theory of action was the implementation of instructional practices that rest on research-based best practices in literacy instruction. The agreed-upon definition of research-based best literacy practices was a process that spanned many years and encompassed a variety of initiatives. To understand the selection of the curriculum, it is important to understand the historical background of how and why Evergreen created the CLP.

In 2000, during the district's adoption of literacy instructional materials, decisions were made to centralize the adoption process. Until then, aligned with Draft 5, Evergreen functioned as a site-based district. This shift from site-based to more centralized decision-making resulted in the district administration researching and selecting three curriculum programs from which the schools were to select. To help buildings make informed decisions, principals and teacher representatives spent time working with district leadership to deepen their knowledge of effective literacy practices. Through these learning opportunities, district administration came to realize that not all teachers had the same understanding of literacy best practices and that best practices identified by district leadership were not being used consistently throughout the district. As a result of this review process, over the next three years there was a growing interest among principals, teachers, and central office staff to develop the elementary literacy program and to build principal and teacher leadership capacity to provide school-based professional learning opportunities. Through this collective learning opportunity, which originated as an opportunity to help schools select a literacy program, the CLP was created.

Ironically, the process utilized to help schools select the most appropriate program for their buildings was the process that led to the realization that no one program could address literacy instructional needs across the district. Over the years of collective learning with building

principals, teachers, and central office staff, an agreed-upon research-based definition of best practice in literacy instruction was developed that, in turn, guided the work done through CLP. Rather than selecting a particular reading program, the agreed-upon best practice was defined as building a community for workshops for readers and writers—specifically, instruction focusing on thinking strategies, recognizing and encouraging the power of talk, and setting up systems to successfully implement the workshop model.

*Resources.* The Evergreen School District's five-year plan for the CLP started with the 2004-2005 school year and included funding for teacher learning. All CLP teachers were provided substitute release time to attend CLP sessions and were paid for the extra time required to plan for and attend school-level CLP sessions. Funding was also provided to compensate the teachers who participated in building-level PLCs that occurred during noncontractual hours. Additionally, in each year of the five-year project, funds were allocated for a consultant to support the planning, implementation, and evaluation of the project. The consultant was present five to six times a year to support the two- to three-day annual summer conference and the five 3-day professional development sessions for the teachers and administration. District literacy coaches were funded to support schools in implementation of instructional best practices. Coaches supported teacher leaders and principals as well as other classroom teachers throughout the district. It was hoped that these resources would reinforce the importance of acquiring new knowledge and implementing new practices at the individual schools. Finally, funding was also budgeted for principal learning sessions.

In summary, collaboration and continual learning were the common threads that impacted the structure of learning for adults and students, curriculum choices for adults and students, and how resources were allocated to support these initiatives. Structures to support this learning were

implemented through professional development, in which teachers learned together through various PLC opportunities. The curriculum choices for adults were guided by Draft 5 influences, under which teachers provided input on what they needed as next steps. The CLP used teacher input to create inquiry PLCs for teachers to deepen their knowledge with a specific focus. The curriculum choices for classroom instruction, workshop models, and teaching metacognition ensured that collaborative and continual learning was occurring for students. Resources were allocated to support teacher collaboration and structured self-selection of instructional foci. Resources were provided in the form of substitute teachers and paid extra time for them to learn and plan for collaborative learning opportunities. The workshop model and PLCs were the primary structures implemented to ensure that collaborative and continual learning was occurring for students and adults in Evergreen. These structures, in concert with Draft 5, impacted how individuals in Evergreen assumed different roles and interacted with each other, further influencing the rich context in which these teachers learned and worked.

### *Roles and Relationships*

To accomplish the goals of CLP, and to honor the intentions spelled out in Draft 5, specific aspects of participation were outlined for principals and teacher leaders. These expectations provided learning opportunities to assure that all participants learned the same information, had the same experiences, and participated in collaborative decision-making regarding literacy best practices. Principals were expected to continue to learn and deepen their understanding of literacy practices adopted by the district and to make learning public. To this end, principals were required to participate in trainings, establish frequent and consistent communication with the literacy teacher leader, participate in collaborative learning opportunities at the school, and support the process. Additionally, they were required to support

the development of a community of learners among their staff and build awareness and common understanding of district literacy practices. In addition to working closely with building administration, literacy teacher leaders were expected to continue to refine their implementation of literacy practices by participating in professional development, reading professionally, sharing their learning with others, and facilitating a small professional learning group of teachers at their schools. The roles that teachers assumed and the relationships they had with peers, their principal, and the district literacy coach all influenced their experience in CLP.

In addition to the context of the district and the CLP initiative (i.e., the structure, culture, and roles and relationships) the processes of dialogue and deprivatized practice, dialogue and inquiry, and dialogue and resource sharing through the CLP added an additional layer of complexity that influenced the teachers' experiences.

### *District Processes*

Following Mangin's (2006) framework for understanding teacher leadership, the next section will focus on the processes that the teachers engaged in at the district level as they participated in the CLP project: dialogue, deprivatized practice, inquiry, and resource sharing. Although Mangin separates dialogue from the other processes, I include it in all of the processes. The CLP is based on collaboration; consequently, dialogue is an essential part of each process. As a result, I have chosen to analyze dialogue with each of the processes: deprivatized practice, inquiry, and resource sharing. Below, I begin by explaining the general outline of each process. Following that, I describe in greater detail each teacher's experience at the district level.

*Dialogue and Deprivatized Practice.* Both teachers had several opportunities to engage in dialogue regarding deprivatizing, or opening classroom practice to peers, throughout the course of the year. One type of opportunity was as a member of a group of teachers visiting another

teacher's classroom. Another was by being the classroom teacher who opened her classroom to a group of teachers. Observing and being observed were expectations for all CLP participants. However, modeling as a classroom-learning lab could be accomplished as a class lab during a CLP session, as in Sarah's case, or as a class lab for other teachers in their respective buildings or for other teachers in the district, as in Halley's case. All the observations followed the same district protocol, as was described above (e.g., conversation about expectations and setting student-centered look-fors, observation, follow-up discussion on what was noticed and next steps). The intent was to practice this protocol as part of the CLP training and then introduce this process to the buildings, with the end result being buildings and individual teachers taking the initiative to open up their classes utilizing this protocol without the coordination of district administration. Eventually, this protocol and opening up classrooms for observation would become a natural part of the culture in each school in Evergreen.

My observations of this deprivitization process revealed that a literacy coach or the consultant worked with the teacher whose class was being visited and facilitated group discussions both prior to and following the observation. The process began with the coach or consultant visiting with the classroom teacher to discuss the lesson plan and specific areas on which the teacher wanted feedback from peers. Prior to observing in the teacher's classroom, the coach facilitated a conversation with observers about the norms for observing in the teacher's classroom, then had the teacher share the lesson while providing background and presenting the problem of practice or area of focus on which he/she wanted feedback. For all but one observation, the group would then brainstorm a list of student outcomes or characteristics they would look for during the observation. An important norm was to keep the focus on student outcomes and behaviors and not teacher evaluation, providing a safe environment for the host

teacher. During the observation, teachers would focus their notes on the specific “look-fors” or other evidence that was aligned with the teacher’s “problem of practice.” Following the observation, the group would get together and discuss what they noticed. The teacher would then reflect back to the group what she took away and the next steps she would take with the class. The protocol concluded with a reflection on the process. This provided an opportunity for the CLP teachers to reflect on the observation protocol rather than the lesson, and for teacher leaders to step out of the role of participant, focus on what went well, and think about how they could implement similar processes at their own schools.

Classroom observation was a key component of the CLP. During each session, teacher leaders visited at least one classroom. In addition to CLP opportunities to visit, the teacher leaders were also expected to welcome peers from their own school as well as visits from other teachers in the district as a part of professional development for the building and new/struggling teachers throughout the district. Both teachers in this study had the opportunity to host a group and visit other classes. In talking with both teachers about what they gained from these professional development opportunities, the process of observing and being observed—as well as the dialogue throughout—was referenced most frequently. Regardless of their evaluations of the lessons they observed, teachers reported that each time they had an opportunity to reflect on teaching, they came away with new ideas for enhancing their instructional or leadership practices.

At the start of the year, Halley and Sarah were introduced to the new observation protocol and the focus for the school year: writing, with a specific concentration on word study. Word study will be further explained in the following section, but in brief, the word-study PLC component included focused reading, observations, discussions, and reflection on the area within

word study teachers had selected—word work, spelling, or vocabulary. During the October CLP session, teachers were asked to select their focus groups and topics, learn and experience the new protocol for observations, and observe a literacy lesson. The summer institute addressed writing instruction, so the lessons that were observed during the first session of the year were writing lessons.

One of the first observations for the year for the group of teachers in the intermediate grades (3-5) was in Sarah's class. The objective of Sarah's lesson was making writing meaningful and assessing whether students were making meaningful entries in their writing journals. Sarah and Halley later reflected that with the new protocol for observations, they took away new knowledge and ideas for immediate implementation in their practice, as well as an appreciation for the protocol process as a valuable learning tool.

Sarah found value in the student-centered protocol, conversations, and observations. She reflected that the protocol provided an opportunity to focus the group discussion on student learning, with particular attention to a specific area. As the teacher being observed, the focused discussion provided Sarah with learning strategies she could implement in her own practice. Even so, she stated that the discussions and observations alone had not influenced her; the protocol's specific and guided focus allowed her to get the most from the experience. During the reflection following the first CLP session she stated:

The new protocol is not just observing to get ideas[;] having specific look-fors makes it easier to get more out of the observation. We look for specifics. As the teacher, I am made aware of things that I was not aware of. Instead of hearing the same things over and over again, feedback was beneficial. What other teachers noticed helped to guide how I

would support my students. For example, turning and talking during writing in the mini lesson and during lesson—the idea of kids liking to hear each other’s ideas.

The process of opening her classroom and having discussions with her peers to reflect on the experience provided an opportunity for Sarah to look critically at her practice and instructional planning. Sarah reflected that getting and giving feedback did not need to be a scary process, but rather one that allowed her to improve her teaching. The focus of the observations provided clarity on observations as well as content knowledge, which allowed her to more accurately assess her successes.

Halley’s reflection following the first observation experience revealed that she had also learned specific strategies for changing her instructional practice. Specifically, from the group discussion on the observation she was reminded her to “be more intentional” during instruction. For example, she learned about changes she wanted to make in routines and language, including using music to mark and manage transitions and using terms that make explicit what students are doing, such as telling them that they were “building stamina” for reading and writing. Similarly, she learned about changes she wanted to make in how she planned and structured learning, such as structuring turn-and-talks to increase student engagement. These were all specific actions that were brought up during the debriefing discussion following Sarah’s lesson, which Halley observed. The post-observation conversation centered on (a) turn-and-talks and that allow students to engage in meaningful conversations; (b) the importance of modeling, being explicit about outcomes, and think-alouds; and (c) the importance of giving students time to read, write, and talk so as to build their stamina in workshop.

Following the discussion on the lesson, the group concluded their time together by reflecting on the new protocol and process of observing in other teacher’s classes. The teachers

appreciated the student focus, starting with the teacher generated guiding question about practice and having student-focused look-fors. The group agreed that feedback that was student focused was less stressful than focusing on the teacher, and that having a list of looks-fors also helped to keep the observation and follow-up conversation “on task” and provided a “common understanding.” As a result, teachers came away from their first experience of the new protocol with increased knowledge of literacy instruction, as well as an introduction to and familiarity with the protocol for conducting classroom observations.

The student-centered focus also allowed Sarah to learn from an observation that she perceived as not having gone well. In addition to best practice, Sarah was also given the opportunity to learn from non-examples. Through these observations she recognized some strategies that did not work and others that needed to be implemented if a lesson were to be successful. She talked through an observation that did not go well:

The preteaching was missing. Missed the purpose of the activity/lesson. She did not do set up. I never in a million years would have given the students a paper and said here are some books—come up with words and plug them in. I wanted to say STOP WAIT! What a waste of time for him to take random words and putting them into categories and not knowing whether he was right or not. They did not know what they were doing was meaningful and purposeful. She did not even teach them how to pick words.

Although Sarah did not walk away with new teaching ideas, this observational experience, focused on student outcomes, provided a format for her to identify what did not go well and why. Sarah was able to see, in action, the importance of setting the purpose and structuring a word-study lesson. She had the opportunity; therefore, to reflect on what she

believed was best practice as a result of this observation, which substantiated her knowledge and beliefs.

At the end of the year Halley and Sarah reflected on their growth as instructional leaders due to their experiences observing, reflecting, and discussing with peers after using the protocol for observation. This section concludes with Halley and Sarah's reflection on their growth and understanding as instructional leaders.

Halley's focus encompassed both the strategies she had learned and the process of learning. So, although similar to the start of the year, when she had discussed changes to her practice, her end-of-year reflection evolved into a reflection on her role as a teacher leader. She stated:

Most of all I feel like I model that I am a learner. My role is to try them [different instructional strategies] out and talk about them. I was nervous. I am not an expert. [Now] I feel comfortable, because my role is as a learner.

Halley reflected that her role as an instructional leader was not to be the school expert, but rather to model being a continual learner. Through her experiences in observing classes, debriefing the protocol experience, and being observed, she seemed confident and comfortable as an instructional leader because she defined her role not as being more than her peers, but as a learner alongside her peers.

For Sarah, opening her classroom for observation and observing others were powerful learning opportunities as she grew her instructional practice. In addition to reflection time and best-practice strategies, Sarah also said that by using protocols to observe others and be observed, she had gained confidence as a leader:

It gives me more confidence on leading a group. I have done learning labs where I have been the teacher and where I saw others. I never would have taught [in front of others] if

not for CLP. Protocols helped keep focus and allow us to get through a great deal in a small amount of time.

Through these experiences and the structure provided by the protocols, Sarah realized that she could successfully be a leader and help her peers as a model and facilitator. She did not need to be an expert to lead, but understood that she could be a leader that learned alongside her peers.

The outcomes of deprivatized practice and discussion with their peers regarding observations and next steps were increased knowledge, immediate changes to their instructional practice, and information they could use in planning for instruction, facilitation, and leadership. Halley and Sarah gained an appreciation for opening up one's practice—theirs and others'—to learn about and discuss with their peers effective and ineffective practices and to think about next steps for instruction. Following their discussions of instruction, the PLCs also discussed the protocol process. This provided an additional learning opportunity that further enhanced the learning experience beyond just observing the specific lesson for content or teaching strategies. During the discussion, teachers were asked to think about and discuss how and why the student-centered focus was effective. They were not only asked to reflect on best-practice instruction, but what quality facilitation and professional development look like. This increased knowledge and discussion of best practice for both classroom instruction and leadership increased teachers' confidence for leading a group. This was one result of their discussions of the pros and cons of the student-centered protocol and the experience of classroom observation.

*Dialogue and Inquiry.* The inquiry process and participation in an inquiry focus group, while similar to observing and being observed, was a new process for teachers in the CLP. Teachers were required to select an area of inquiry related to word study, vocabulary, or spelling

for the school year. Participants formed PLC groups based on these areas divided between primary (K-2) and intermediate (3-5) grades. Each PLC group of teachers in the CLP was provided a packet of readings and encouraged to engage in discussions, observe lessons, write a reflective summary, and share this summary with their inquiry group.

The general structure of the inquiry study groups was similar for both Sarah and Halley, but they selected different areas of focus; Halley's was spelling and Sarah's was vocabulary. However, through reading, observing, and discussing their area of study, both increased their knowledge, and this influenced their beliefs about best-practice instructional strategies for their chosen area.

Following the January CLP session, which was the first inquiry-focused session, Halley's reflection revealed that she had learned more than just instructional ideas for spelling that she could immediately implement; there was also deeper reflection and questioning behind best practices in spelling. For example, she questioned why spelling lists may or may not be best for student learning. Her midyear reflection continued to include ideas for immediate implementation, but instead of just accepting and implementing what she had observed, she struggled with questions about pedagogy, curriculum, and learning. Following the observation, she questioned how to implement into her practice new methods that were in some ways aligned but in other ways in conflict. She struggled after watching another teacher's spelling lesson:

What I really liked about the lesson was the dialogue that the kids engaged in. The kids were collecting the words. In a group, they had to make a chart with all of their words. I never . . . it was a neat piece that I never thought of using. It forced them to defend their thinking.

Dialogue was really important and kids [were] so engaged about word study.

I was really able to see, firsthand, [that] it was a way to differentiate instruction, having kids looking for their words in their own reading. Kids could access the easier words. But the big question in my mind . . . Joe and I were really in sync about trying something new, and I am still curious on how that will work out for my kids and my structure.

The struggle between “to have lists and not having lists” was one that she continued to grapple with throughout the year. The additional information from observations, coupled with discussion of the observation and readings for the inquiry study, led Halley to question best practice and what she should do for her students that year and in the future.

Sarah’s experience with her vocabulary inquiry group during district CLP sessions was similar to Halley’s experience with spelling. Sarah reflected that she was impressed by how another teacher was able to help students make connections between thinking strategies and vocabulary. This new knowledge influenced the work she did with her class. During the midyear reflection, she stated:

I really like the way she connected vocabulary and thinking strategies and the chart she used to organize their thinking. I think now I will take a word and go in depth with them.

I liked the organization of it and how it relates it to thinking strategies.

By watching another teacher implement a vocabulary lesson, she was able to not only take away a structure she could use with her class—the vocabulary chart—but also see how her peer made connections between vocabulary instruction and thinking strategies, a concept that had been explored during a prior year of the CLP. These ideas prompted her to think about ways she could then improve what she was doing with vocabulary lessons in her own class.

The knowledge gained by reading, discussing, and observing with a specific content focus allowed Halley and Sarah to make some immediate changes to their instructional

practice—but, most importantly, it made them examine their beliefs about best practice. In their end-of-year reflections, both teachers said that these changes in their beliefs about best practice would inform their planning for the following year in spelling and vocabulary. Through dialogue and inquiry study, they had the knowledge required to enhance their immediate as well as future instructional practice.

*Dialogue and Resource Sharing.* Teachers had both formal and informal opportunities for resource sharing. Formal resource sharing opportunities were a part of their experiences when engaged in dialogue during observations and inquiry discussions, so it is difficult to make a clear separation between these processes. Instead of reiterating the process of sharing resources during the other two processes, I will differentiate resource sharing and dialogue as opportunities when the teachers facilitated opportunities with their peers at their respective schools, and specifically, to discuss resources and new ideas. For the purpose of this study, I define resource sharing as formal opportunities to share resources with peers in a learning group facilitated by the teacher leader. The teachers had opportunities to learn and observe skills for facilitating resource sharing during CLP sessions, but they did not have opportunities to facilitate resource sharing during these district sessions. As referenced in prior sections, the teachers learned about best practices for facilitation when they discussed the protocol and processes for the observations and inquiry sessions. During these discussions they explored important concepts for facilitating meaningful learning opportunities. Focused discussions on student outcomes, having student work brought to or referenced in the discussion, and having a reliable structure for conversation were all lessons learned through their participation and discussions in CLP. However, since the teachers were not given an opportunity to try their facilitation skills during CLP sessions, I will not examine the process of facilitating resource sharing in isolation within the district context. Instead, I will

investigate dialogue and resource sharing within the two school contexts in the next two chapters.

In summary, the context and processes by which Halley and Sarah were learning and attempting to lead were intertwined and influenced each other. Although the two teachers are similar, because they taught the same grade level and participated in the CLP work for the same amount of time, each experienced the process in a unique way. The school context and area of inquiry focus were different for each. In the following chapters I will outline the context for the each school and the processes Sarah and Halley used within their contextual experiences as aspiring teacher leaders in CLP.

## Chapter 6: Ocean Vista

Ocean Vista, with 411 students, is one of Evergreen School District's more affluent and homogeneous schools. Seventy-eight percent of the student population identified as White/Caucasian, with less than 4% Black and 4% Hispanic. Fifteen percent of the student population qualified for free and reduced priced meals, 13% qualified for special education, and 3% were categorized as transitional bilingual. The newly modernized building is nestled in a lush green neighborhood with a view of the water; at the entrance the front office is on the left, an extensive library on the right, and the hall leads to an open courtyard that is lined by classroom clusters.

Following the Mangin (2006) framework, this chapter begins with a description of Ocean Vista's teaching and learning context—specifically, the culture, structures, and roles and relationships. Following the description of the context is an analysis of how the context influences the various processes—dialogue and deprivatized practice, dialogue and inquiry, and dialogue and resource sharing—that impacted outcomes for Halley, which included increased knowledge and changes in instructional practice, instructional leadership practice, and beliefs.

### *Culture*

Halley's principal, Kim, and Kim's beliefs and leadership decisions impacted Halley's experiences as a learner, teacher, and aspiring leader. To understand the context in which Halley was working, in the next section I will describe the demographics at Ocean Vista and how these demographics influenced Kim's beliefs and the decisions she made to support the learning needs of teachers and students. I will then describe how student needs and Kim's leadership influenced Halley's decisions and opportunities.

Both Halley and Kim noted that the demographics of Ocean Vista were changing, with an increase of students needing English Language support. However, in comparison to other schools in the district, Ocean Vista continued to be predominantly White, middle class, and English-speaking. They further noted that the changing school demographics probably influenced what they were able to focus on, but they did not go in depth in comparing the possible differences to past foci. After listening to their peers in different areas of the district, they realized that other schools that were more highly impacted had a different focus than Ocean Vista. On average, test scores were high at Ocean Vista. The urgency to focus on struggling students and close a gap was not the primary focus; instead, professional choice and peer learning were encouraged.

Kim had been with the school for more than 10 years. She enjoyed the collaborative and collegial work environment at the school and district level, and she appreciated being able to learn best practice instruction along with teachers and district administration. During the interview she stated that she strongly believed in and supported the “peer-coaching model,” noting that she believed it was important to have an intentional focus on “adults learning together.” Allowing teachers choice in their learning allowed for multiple initiatives to occur at Ocean Vista. She explained that the instructional need at Ocean Vista was in math. As a result, peer coaching occurred regularly with math classes, while literacy meetings, the focus of CLP, were voluntary. Although math was the focus, Kim still was an active supporter and participant in Halley’s PLC, whose focus was a book study on writing instruction. In addition to the math focus and Halley’s book group, a few classes, including Halley’s, were piloting a spelling curriculum. Math was the school wide focus, spelling was another area of learning, and Halley was leading a book study on writing instruction. As a supporter of peers learning together and from each other, Kim was an active participant in the book study group that consisted of Ocean

Vista's CLP teacher leader and four other teachers who had self-selected to participate in order to improve their literacy instruction practices. The culture of Ocean Vista was one of choice and was supportive of collaboration. Kim, an established leader in a school of high achievement, could maintain multiple initiatives, which allowed Halley to have three different learning initiatives for the year.

Halley was able to balance the different initiatives at Ocean Vista because of her established role at school and in CLP. Halley had been teaching for seven years and was a CLP participant from its inception, so this was year three of Kim and Halley's collaborative working relationship on CLP; however, they had been working together at Ocean Vista even prior to CLP. They had an open and collaborative relationship. On different occasions, Halley and Kim mentioned how they had collaborated on literacy professional development for Ocean Vista. Halley felt that Kim was supportive and appreciated that her principal participated in the book study. Kim's support manifested in her participation in the book study and in trusting Halley to choose what the focus would be and how to facilitate the book study. In a culture of choice and where student scores were not a pressing issue of concern, having one common focus was not the priority. Halley focused on spelling because she was already piloting the spelling program for Ocean Vista, and decided on a book group on writing instruction. She chose a text she felt confident in, because it had been covered in the prior year during CLP sessions.

In summary, the culture of Ocean Vista allowed for Halley and Kim to focus on extending programs and enhancing opportunities for adult learning. In one word, Ocean Vista was "comfortable." The principal was established, well liked, and trusted. Student scores were, for the most part, high, and there was no sense of urgency to change. Ocean Vista was a school of comfort, choice, and collaboration.

### *Structure*

Halley's learning and leadership were influenced by the CLP curriculum and Ocean Vista, and the resources she had at her disposal as Ocean Vista's CLP teacher leader. The curriculum influences that impacted Halley were twofold. The first was her participation in and expectation from the CLP, which included observation opportunities, participation in a learning group, and facilitating a learning group. The second was her piloting of a new spelling program for Ocean Vista. These curriculum structures and the resources at Halley's disposal influenced the learning and leadership opportunities for Halley over the course of the year.

Halley participated in observations and a spelling inquiry group as a participant in CLP. The expectation was that she would take what she had learned from CLP and bring this learning back to Ocean Vista. Halley was able to bring information back to her school in two ways: as a facilitator of a book study and by opening up her classroom as a learning lab for her peers at Ocean Vista. Halley led a book study of the text that had been used the previous year, *Wondrous Words* by Katie Wood Ray, which supported the workshop model of literacy instruction but was not connected to the spelling focus for Halley's inquiry PLC. Participation in the book group was voluntary, and teachers were paid for their time. Halley's principal was invited and attended, and was an active participant in two of the three sessions I attended. The group decided on the dates and times of their meetings as well as what the focus and reading/work expectations would be for the following meeting. Halley was able to provide the teachers with credits and pay for participation in the voluntary book study.

The other way Halley shared her knowledge from CLP with the Ocean Vista staff was through opening up her classroom as a learning lab. During the lab, she worked collaboratively with her district literacy coach in outlining her problem of practice or the focus for her lesson.

She invited a number of peers from her school to observe her lesson. With the support of the literacy coach, similar to the CLP protocol's guided observations and discussions, the group came up with a list of look-fors, or things that the students would say and do. Based on the lesson's focus and their observation of the lesson, the small group discussed what they had observed and possible next steps.

The structure of Ocean Vista's learning environment aligned with the comfortable culture of the school. The structure was one of trust and choice. Teachers were trusted to participate and lead each other in learning opportunities.

### *Roles and Relationships*

Halley assumed a variety of roles over the course of the school year that influenced her learning and opportunities to lead. These roles included being a participant, model, and facilitator. As a participant in the district CLP activities, she engaged in discussions about content and observed and provided feedback during the CLP-guided classroom visits. She participated during the district learning groups by reading the spelling articles and discussing them with her peers from around the district. As a participant, she gained confidence in her knowledge of literacy instruction and in the process of both being observed and observing. She was able to see firsthand that observations were learning opportunities and not opportunities to criticize each other.

As a model, Halley opened up her classroom with the support of the district literacy coach so that she and her peers in the building could look closely at what students were learning and doing during her literacy instruction block. Following a format similar to the district protocol, during the pre-observation discussion for the writing lesson the literacy coach facilitated setting the norms, and after Halley shared her lesson objective, the coach facilitated a

discussion about the look-fors with Ocean Vista teachers. The literacy coach helped the observers understand how to provide feedback that would be most beneficial for Halley's growth as a teacher. Halley then welcomed the group of teachers into her classroom while she did a mini-lesson, facilitated independent practice, and provided closure to the lesson. The literacy coach then facilitated the group discussion, during which teachers shared what they had seen during the lesson and Halley had the opportunity to explain what she was taking away from the experience. As a model, Halley was able to share her new knowledge with her peers and model that she was not in the role of expert, but rather that she was learning alongside her peers. The district literacy coach helped to create an environment where the observation and discussion set up a relationship between Halley and her peers that was one of equality rather than hierarchical.

As a facilitator of the book group, Halley set the tone for the conversation as well as initiating discussion of *Wondrous Words*. She provided snacks and coffee for each meeting, which took place after school. She sent out emails reminding all the participants, including her principal, of the time and expectations for the next meeting. The meeting times had been discussed at prior meetings and information disseminated. In addition to logistical direction, she suggested when to bring student work and why, suggested guiding questions based on the reading, and talked about instructional strategies teachers might want to try. She started the meeting by sharing first or asking others to share their ideas. All members had an equal opportunity to contribute and all members, including the principal, were peer learners. As facilitator, Halley volunteered ideas and asked for input on next steps for the collaborative meetings. It was an opportunity to have various teachers and their principal learn together on an equal playing field.

As a participant, model, and facilitator, Halley had opportunities to enhance her instructional practice and learn about instructional leadership. These roles demonstrated to her that every participant, regardless of role or station, was a learner. These interactions, teacher-to-teacher and teachers with their principal, established relationships of equality and allowed Halley to see how instructional leadership did not need to entail her taking on a “higher” station. She realized that she could lead by learning alongside her principal and peers.

In summary, the culture, structures, and roles and relationships created a learning environment at Ocean Vista that was one of comfort, trust, and choice, and where everyone, regardless of station, learned together. Understanding the context in which Halley was learning and working was integral to understanding the processes Halley experienced as a learner and aspiring leader in the CLP. In the next section, keeping in mind the context in which Halley was learning and working, I will analyze Halley’s experiences as she engaged in dialogue and deprivatized practice, dialogue and inquiry, and dialogue and resource sharing.

### *Dialogue and Deprivatized Practice*

Over the course of the year, Halley’s reflections on what she took away from CLP observations evolved. At the start of the year, when asked what she had gained from her observation and discussion experiences, she said they were “a good reminder of best practices” and helped her become “more intentional” during her own instruction. However, by the end of the year, she was reflecting on her experiences as an “opportunity to model” what it looked like to be a learner. Her end-of-year reflection was evidence that she had a more global understanding of the observation process. In order to examine the changes Halley experienced, I will summarize the learning she acquired through discussions of lessons she had observed and opportunities for others to observe her.

After the first CLP observation of the year, which was in Sarah's classroom, Halley brought the insight she had gained back to Ocean Vista. This practice of observing and then sharing knowledge with her Ocean Vista peers was a success indicator for Evergreen. Halley's use of a lesson that addressed the key points discussed during the CLP observation was evidence that when teachers were provided with structured collaborative learning, observation, and discussion opportunities, they would feel comfortable bringing what they had learned about content and instructional leadership back to their schools. Halley's reflection following her October CLP session was closely related to her open-lab observation for her peers at her own school. Many of the key discussion points from the first observation were evident in the lesson that Halley modeled for her peers. Instructional best practices, such as modeling, student discourse, explicit teaching of expectations, and making writing meaningful, were all concepts that were discussed during both post-observation discussions of the lessons.

The teachers remarked that students had listened to each other and noted the importance of turn-and-talk and student voice—an important point that had Halley taken away from the prior month's observation of Sarah's classroom. A similar idea was the importance of the teacher's modeling and being explicit about what is important. During the reflection on Halley's lesson, one of the teachers said that "kids will buy into what adults care about." Halley's modeling and being explicit about expectations was a take-away that Halley wanted to focus on in her practice after watching Sarah, and one that the teachers in her observation also focused on. Another theme from the post-observation conversation was how to include student choice and writing on topics that are meaningful to them. Although student choice was not a focus of conversation following Sarah's observation, the concept of meaningful writing was the focus of the lesson that Halley observed in Sarah's classroom. One of the expectations and goals of CLP was to create a

culture of teachers bringing what they had experienced at CLP sessions back to their buildings. The similarities between the discussions following both observations are examples of how the structure of learning opportunities from CLP may have influenced how practice and learning occurred in communities at the school level.

### *Dialogue and Inquiry*

Another type of learning opportunity available to Halley in CLP was the inquiry study of spelling. This focus on spelling was meaningful for her, since she was piloting a new spelling program for her school. In addition to being the inquiry focus for Halley, spelling was also one of Ocean Vista's focus areas. At midyear, dialogue related to spelling was an opportunity for Halley to not only gain ideas from her peers, but also validation of her practice and an opportunity to reflect critically on her own practice and what her students were learning. According to Halley, it was "helpful to hear that others struggle with implementation" and "share common concerns." By the end of the year, not only were the discussions helpful and affirming, but, as Halley noted, "It's not like lots of questions were answered about word study, but I learned about best practice and how to question." The focus on spelling provided opportunities for her to build her knowledge base and reflect on and question best practice and next steps.

Halley's January reflection consisted of two parts. The first was a feeling of validation and confirmation that spelling instruction was not as simple as a list and a test. The second and overarching theme was her questions about spelling instruction. These questions were a result of the CLP guided observation and the articles her CLP group had discussed. She questioned how to balance and implement Ocean View's pilot program—which was more of a direct-instruction spelling model—with what her PLC had discussed as best practice in spelling instruction, which encouraged differentiation in the workshop model. Specifically, she struggled with how to

balance the time-consuming nature of conferring with individual students and flexible grouping in spelling with the demands of the workshop for readers and writers. Discussions with her PLC during CLP sessions did not seem to align with the spelling program she was piloting.

Before the CLP spelling lesson that Halley observed, the teacher explained his multifaceted spelling program. This consisted of individual weekly spelling lists and lessons that focused on specific spelling patterns, in which students examined the patterns in their leveled independent reading book. Halley commented that during the CLP session it was nice to hear that other teachers were struggling with spelling, but said that she had walked away with more questions about how to teach spelling in a meaningful way. As discussed previously, she appreciated the lesson and discussion that students had about spelling. However, with a few days to reflect and return to the school program she was piloting, she had a number of questions about how to take what she had seen and discussed with her peers during CLP and implement these ideas into her practice.

“So now I am wondering, What about the kids that already know the rule and know words? I think a lot of the kids know those words. Now, if this week we are doing this rule, . . . what does that test look like? Do they just get a list of those words, their own list, or do they even need a list? Do I even need a list if I am testing a rule? Maybe if I am testing the rule I don’t need a list?”

During my January debriefing with Halley, she talked a lot about the pros and cons of teaching spelling using a list of words. Another facet to her questioning was from the spelling research that she had read and discussed with her CLP inquiry group. In addition to thinking about having different sorts of lists (e.g., based on a spelling rule, most common words, a program, or individually created lists from students’ independent reading book), some of the

articles she had read caused her to question whether the list should be based on words that students need to be memorized.

It's okay to memorize, some words need to be memorized—[I] read in PD reading that some words you need to memorize. This was good for me to hear. This also makes me think, what kind of system do I need to have in place so they can memorize the words they don't know?

Halley's questions about and reflections on spelling instruction were a result of the observation discussions as well as the work the CLP inquiry group did related to their reading. My January interview of Halley was the longest we had had all year, because of the number of questions and connections she made following the January CLP session. It was complicated by the fact that she was piloting the new spelling program for Ocean Vista, so although she had all these new ideas and questions from her CLP experience, she was confined to the program that she needed to implement with fidelity. During our discussion, Halley mentioned that since she and her partner teacher were already implementing the new spelling program, many of the ideas she was learning and grappling with would be implemented in the future.

During the March reflection, when asked about her thoughts on spelling, Halley explained that although the focus of the March CLP session was on spelling and vocabulary, due to the state assessment coming up, spelling was "being put on the back burner for now." Although the CLP discussion was on the spelling articles and spelling lesson, since Halley was not focused on spelling instruction, her major take-away was a general "best instructional practice" that was a summary of the discussion following the observation. Although it had to do with the spelling lesson, she explained that her take-away was a reminder to be intentional about providing time for students to talk and explore together.

It is so easy to get into the routine of, I give them an example, we practice together, and they go back to [their] seat and try. Collaboration is missing. Giving them a chance to collaborate during large group, small group, and individual practice. Making times for kids to talk and make choices and defend their choices.

Since Halley was taking a break from focusing on her own instruction on spelling because her class focus was on preparing for the state assessment, her reflections from the inquiry discussion and observation aligned more with what she needed at the time. This was an interesting contrast to the lengthy discussion we had had in January about spelling lists and the “what and how” of teaching spelling.

Although Halley’s instructional practice for spelling was not a focus for her in March, the intentional focus on spelling for the year allowed her to grow her knowledge base around spelling instruction. She may not have directly implemented changes to her spelling practice with her class, because she was confined to piloting the new program, but at the end of the year she was not only a critical consumer of a spelling program, but a critical and reflective practitioner of spelling instruction. During our end-of-year conversation, she said, “[It’s] not like lots of questions were answered about word study, but I learned about best practices and how to question because I had time to reflect [and] discuss and time to read professional texts.”

Halley summarized her learning and change in beliefs with regard to spelling instruction in her end-of-year reflection, which she shared with her inquiry group. As a pilot teacher of the new spelling program at Ocean View and a participant in the spelling inquiry group, she ended the year with a better picture of what she wanted out of her spelling program for the following year. She summarized her learning during a conversation with her inquiry group:

I piloted [a new spelling program] for my school, but did not feel it was meaningful; it seemed like a separate part of the day. I was not seeing connection between writing and spelling. I know that kids need a blended model. They don't need a weekly scheduled list but need lists and memory. Individual lists are not necessarily most efficient. . . . Seems overwhelming to bring it all together in a cohesive unit.

I would like it to be more of a process. Independent lists take a long time, and I question if the time we spent on this is worth every second. I think it's important to have them [students] understanding that spelling is important and meaningful and that it all fits together—scope and sequence.

By the end of the year, Halley may not have felt she had all the answers, but she did have a better idea of what she needed, a scope and sequence for spelling instruction, and what she wanted out of a spelling program. Through the course of the year, spelling took on various levels of focus for Halley. In January she spent a great deal of time reflecting on this “new” concept. In March, she “put it on the back burner” for her instructional classroom practice, but continued to do professional reading about and observation of spelling instruction through the conclusion of the year. In May, her reflection included questions, but also the beginnings of a plan for the fall and a critical eye to what she had been doing this year. By the end of the year, Halley's knowledge about spelling had increased and she was slowly getting answers to her spelling questions and preparing for spelling in the fall.

For Halley, the context of working and learning in Ocean Vista, her experiences with piloting the new spelling program, and the inquiry process and discussion study went hand in hand. All interacted with each other and contributed to the learning opportunities and reflection opportunities Halley had over the course of the year.

### *Dialogue and Facilitating Resource Sharing*

I observed four sessions in which Halley facilitated the small group discussion of the text *Wondrous Words*. This was the CLP text that had been used by teachers and administrators the previous year and the book that Halley's group used for their book study. Over the course of the book study group, Halley's role as facilitator changed from being a passive facilitator to a more active facilitator of the group.

During the October meeting, the evidence of Halley's leadership was that she sent out the email inviting everyone, let them know what chapters needed to be read, brought snacks to the meeting, and started off the conversation with, "What did you think?." Both Kim and the literacy coach were present, and Halley relied on the literacy coach to facilitate the discussion. The literacy coach asked the probing questions and made comments to connect the teachers' ideas to each other. The teachers went around the group sharing ideas that they found interesting or questions they had about implementation. The conversation concluded with Halley asking the group to share what they "took away from today's group" and to read the next chapter for the next meeting. The take-away points that teachers brought up were ideas from the chapter. The outcome of the discussion for the teachers and Halley was a summary of the text they read.

The November session was a discussion of the next chapter; the literacy coach and Kim were absent. The second session was similar to the first, in which the outcome was a summary of the chapter. Without the literacy coach present, however questions that were discussed were written down and Halley told the group she would ask the literacy coach and get back to them the following session. The role of expert appeared to be held by the literacy coach: The holder of knowledge was not the one of the teachers who had read what the expert had written or

implemented some of the ideas, but another teacher who was no longer in the classroom but had the title literacy coach.

Following the second book group session, Halley expressed concern about the second session not having as many people participate in the discussion. We talked about relying on the literacy coach and brainstormed ways of engaging the teachers in the discussion. Halley decided that prior to the next session, which would be in December, she would send out an email asking the teachers to reflect on two things while they were reading. The first question she posed was, “What is a question you have or something that challenged your thinking?” The second question was, “What will you implement in your class?” It was interesting that after the first session, where the coach and principal were present, Halley did not seem to appear to be concerned about facilitation of the group. However, when the coach and principal were absent, leaving her in the leadership role, she seemed more aware of the participation and depth of conversation. Being “forced” into the role seemed to trigger her to reflect on how to improve the facilitation of the book group.

During the December session, each member of the book group took turns sharing. Since the teachers were asked to bring a question or a challenge, they had to reference the text as well as make a connection with their own work. Instead of Halley leading with the broad “What did you think?” question, the teachers were prepared to respond to the two questions and made comments on their peers’ questions and challenges. Prior to the end of the session, they were faced with having to finish the book. Kim, the principal, suggested a “jigsaw” of the reading. The group decided that they would each pick a chapter that remained, try something with their class, and then jigsaw the readings for next meeting.

Following the December session, Halley was pleased that everyone had had something to say and that there had been a natural flow to the conversation. She was also pleased that everyone gave each other feedback during the discussion. Instead of questions being brought to the literacy coach, the group commented on each other's challenge and brainstormed ideas. Since she felt it went well, she planned on using the same format for the next session. Her one hesitation was that all the teachers would be reading different chapters. Since Kim had suggested it, she went along with it, but was still concerned that not having a common reading would not allow for as productive a session as the one they had just completed.

During the second December book study, the teachers did a jigsaw of the last several chapters in the book and shared a reflection of what they had tried with their classes. Since they shared ideas specific to each of them, the session mainly consisted of group members sharing their ideas, as opposed to the previous discussion, in which they had been able to comment on the shared reading. During the reflection following this book group, Halley prefaced sharing her take-aways with her concern about not doing a shared reading. She had gained a variety of ideas from the conversation. She did not comment that it was good or bad, but just explained that her ideas were not all on the same topic and that her concern that it would be difficult with everyone having different readings had been validated. It was interesting that although the plan went against her "gut feeling" that having all the teachers read different chapters would not be the ideal, she went along with it because her principal had suggested it. Although she appreciated her principal's participation and support in the book group, the benefit of her participation for Halley's leadership development was questionable. Although Halley had a solid idea as to what should happen with facilitation, she went against her better judgment to defer leadership to the participant with the title of leader.

At the end of the year, Halley reflected back on her experiences with the book group and said that she had gained knowledge of how to improve her instructional practice and believed that she became a critical consumer of professional development. Halley felt that she had a better understanding of how reading and writing go hand in hand. Although *Wondrous Words* focuses mainly on writing instruction, she felt that the process had helped her learn how to be a more thoughtful participant in professional development and how to lead her own professional development discussions. She explained that as a participant in professional development, she was thinking to herself, “What’s going on here?” She was questioning the objective of the professional development beyond just what she was taking away to implement in her classroom. She was more aware of how the teachers in the group were learning. She explained that she had enhanced her content knowledge, but also felt that she had gained a greater appreciation of the importance of learning, critical thinking, and questioning. In reflection on this book study and what worked and did not work, she explained that she and the principal were already working with the literacy coach to come up with ideas for study groups for the following year.

The roles that Halley assumed, the relationships and learning atmosphere set by Ocean Vista’s principal, and Ocean Vista’s culture of trust and choice all influenced how Halley facilitated the learning group and what she got out of the experience. The experience of being both a facilitator and participant in the book study gave Halley both content knowledge and ideas on how to best support adult learning in her PLC. As a participant and facilitator, she experienced the benefit of having a common learning experience focused on individual classroom practice. The culture of Ocean Vista, where everyone was a learner and the principal was learning alongside teachers, created an atmosphere that supported Halley’s development of her own instructional practice, but in some ways challenged her capabilities in leading and

planning learning groups for her peers. Having the coach and principal participate in the PLC, although appreciated by Halley, was not beneficial to her development as an instructional leader. When given the option to not stand out as a leader, as observed in the first meetings and the last meeting, she deferred to those with the title of leader as opposed to practicing the facilitation skills she had gained through the CLP sessions. Even though both the principal and coach were trying to support Halley in her role as instructional leader through their participation in the book group, their presence unintentionally undermined Halley's attempt to fully assume the role of instructional leader.

## Chapter 7: Valley View

Valley View Elementary School, with 495 students, was one of Evergreen School District's most diverse schools. Thirty-five percent of the student population identified as White/Caucasian, 35% as Hispanic, 11% as Black, and 12% as Asian/Pacific Islander. Sixty-four percent of the student population qualified for free and reduced-price meals, 12% qualified for special education, and 35% were categorized as transitional bilingual. Located on one of the busiest streets of the city, the school is comprised of a cluster of 1970s buildings. Facing the parking lot is the main office.

Following the Mangin (2006) framework, this chapter begins with a description of Valley View's teaching and learning context, and specifically the culture, structures, and roles and relationships. This is followed by analysis of how the context influenced the various processes—dialogue and deprivatized practice, dialogue and inquiry, and dialogue and resource sharing—that, in turn, influenced outcomes for Sarah. These included increased knowledge and changes in instructional practice, instructional leadership practice, and beliefs.

### *Culture*

The needs of Valley View's student population and how Sarah's principal, Gail, reacted to these needs impacted the culture of learning and leading at the school. This, in turn, impacted Sarah's experiences and decisions as a learner, teacher, and aspiring leader. To set the context of Valley View, in this next section I will describe Gail, her beliefs and struggles with district norms and expectations, and how this struggle impacted Gail's leadership and the decisions she made to address the demanding and urgent needs of the student population at Valley View. I will

then describe how student needs and Gail's leadership also influenced Sarah's decisions, actions, and leadership opportunities.

Gail, had been Valley View's principal for two years. Unlike Ocean Vista's principal, Kim, who was a veteran and had established relationships in the building and district, Gail principal was struggling to establish herself as a leader. She requested that our interview not be recorded when she discussed her perceptions of the district and the school.

Compliance with Draft 5 and participatory decision-making was a challenge for Gail. In an effort to establish her leadership in the school, she struggled with balancing top-down expectations and building a collaborative instructional leadership model within the school. Gail expressed concern that they were not meeting the needs of the high percentage of students who were English Language Learners. Valley View's demographics, which includes 35% English Language Learners (ELLs) and more than 50% of students receiving free and reduced-price meals, were the underlying thread through all the conversations with Sarah and her principal. The sense of urgency to support these learners was apparent from their very first conversations and continued throughout the year. Gail and Sarah were keenly aware of the heavy burden that closing the achievement gap and meeting adequate yearly progress (AYP) goals would present for Valley View. Gail struggled to balance the urgent needs to address student achievement, CLP expectations, Draft 5 expectations, and site-based decision-making. In the end, Gail's focus on meeting AYP and district expectations resulted in a culture of urgency and top-down mandates at Valley View.

One example of Gail's attempt to balance top-down expectations with teacher choice, while adhering to the spirit of Draft 5 and district expectations for CLP, was an initiative called "Learning Wednesdays." According to Gail and Sarah, Valley View's focus was on ELLs and

reading across the content areas. Learning Wednesday was an attempt to ensure that all teachers were provided an opportunity to enhance their knowledge to support student achievement through a PLC. All teachers were required to be a member of professional learning group focused on content-area reading that would meet once a month during designated Wednesday staff meeting times. Teachers were allowed to select the group they would be working with for the year, thus allowing teacher choice—but since meetings occurred on Wednesdays during required staff meeting times, all teachers were expected to participate. These professional learning communities were lead by teacher leaders in the building and focused on their chosen content areas and student work. Having teacher leaders facilitate the groups accomplished the CLP expectation that Sarah would facilitate a group that was supported by the principal. Gail supported the PLCs not by attending, but by ensuring that Sarah had a captive audience. Although Gail intended to balance top-down leadership by supporting professional learning groups that were teacher-led and provided an opportunity for teachers to self-select the groups they participated in, Learning Wednesdays were perceived as principal-directed and mandated.

Valley View's culture of urgency and mandates, coupled with Gail's leadership, influenced Sarah's decisions and opportunities to learn and lead. One example of how Valley View's culture impacted Sarah's decision-making was her selection of a focus on vocabulary instruction for her inquiry area of focus. Building vocabulary is a vital component of content area reading and supporting ELL students. Sarah's selection to focus on vocabulary was intentional and necessary in light of Valley View students' urgent need to succeed in school. Gail's Learning Wednesdays also influenced Sarah's opportunity to learn and lead the building's PLC. One of the requirements for CLP was the principal's support for building-level PLCs. Learning Wednesday was Gail's effort to support Sarah's PLC at Valley View. However, her gesture of

support actually resulted in a diminished leadership opportunity for Sarah. Unlike Halley, Sarah was not given the opportunity to make decisions. Instead, the PLC had a pre-established mandate for participation, format, and content.

Leadership at Valley View was not as established as Ocean Vista and, coupled with the low achievement of the students, created a culture where teacher learning was implemented through structured choice initiated and monitored by the principal.

### *Structure*

Sarah's learning and opportunities for leadership at Valley View were influenced by the organizational structures in place as a result of (a) the requirements for participants in the CLP and (b) expectations for Learning Wednesdays. The requirements for CLP included being a model and making classrooms available as classroom labs, participation in an inquiry-learning group, and facilitating a learning group. In Chapter 5, I discussed how the CLP structure influenced Sarah's opportunities to deprivatize her practice as a result of CLP observations and her participation in an inquiry PLC. The current chapter will focus on Sarah's experiences at Valley View. Specifically, I will examine the structures in place outside of the CLP observations—first, the ones that Sarah opted for that allowed her additional opportunities to open up her classroom practice, and second, Learning Wednesdays. These two structures influenced the learning and leadership opportunities for Sarah over the course of the year.

The first organizational structure that influenced Sarah's learning was observation opportunities. Outside of the CLP observations, Sarah voluntarily opened her class two other times during the year. As discussed in the Chapter 5, the first observation of the year for CLP was when Sarah was a model in a class lab opportunity for CLP participants to observe her class. Throughout the course of the year during CLP sessions, Sarah had three other opportunities to

visit other classes, using the student-centered observation and discussion protocol. This section, however, will look more specifically at the other two observation opportunities Sarah volunteered for. The first was when the literacy coach brought a teacher who was struggling with a readers' workshop to observe one of Sarah's lessons. The observation followed a format similar to that for CLP observations. The coach, the other teacher, and Sarah collaboratively came up with look-fors (i.e., "Based on the teaching objective for the lesson, students should be doing x, y, and z"), observed the class, and then debriefed together after the observation.

The other opportunity for Sarah to open her practice was when she voluntarily engaged in a coaching cycle. She initiated contact with the literacy coach and requested the coaching cycle to improve her instructional practice with writing and enhance her ability to encourage student discourse. The coaching cycle entailed planning a lesson with the literacy coach, having the coach observe her and, at times, step in and comment throughout the lesson, and then debrief following the observation. In our first interview, Sarah was excited about opening her classroom for others to give her input. She viewed it as an opportunity to enhance her instructional practice. The outcomes of her having the time and coach to provide these additional observations were changes to her instructional practice, increased belief in her ability to be a model classroom lab, and changes in her beliefs about instructional best practice.

In addition to observations, Sarah collaborated with the science teacher leader at her school to facilitate a Learning Wednesdays PLC in which members discussed nonfiction science books and science journals. In the past, Sarah had led voluntary learning groups with teachers, but this year, with mandatory Wednesday staff meeting times throughout the year, she did not lead a voluntary learning group. Sarah reflected that the once-a-month mandatory meetings felt disjointed, and in comparison to her voluntary and more frequent meetings the previous year, she

did not feel that Learning Wednesdays had increased her knowledge base in a meaningful way. At the end of the year she reflected on her desire to change back to the former meeting structure instead of the mandatory monthly Learning Wednesday format.

The structure of Valley View's learning environment, of limited choice and high accountability, aligned with the culture of urgency and mandates at the school. Teachers were expected to participate in PLCs and believed that they were being held accountable and monitored by their principal. In contrast to Ocean Vista's culture and structure of trust and choice, Valley View was focused on mandates and accountability. Individual choice for Sarah came in the form of taking the initiative to engage in a coaching cycle. Having this opportunity to focus on what she valued excited and motivated her. So, aside from the coaching cycle, the structure for learning and leading at Valley View was one of accountability based on top-down directives. If not for Sarah's initiative with the literacy coach, she would have had a year with little structured opportunity to learn from and within the context of Valley View and her classroom. Valley View's controlled structure and lack of opportunity for her to feel she was invested in her learning and leadership limited her outcomes in these areas for the year.

### *Roles and Relationships*

The relationships she had with her principal and literacy coach impacted the leadership roles she assumed at Valley View. In Chapter 5, I described her roles as a model in a class lab and participant in CLP sessions, the inquiry PLC, and observations. In this chapter I will focus more specifically on her relationships with her principal and literacy coach and, as a result of these relationships, will examine her roles as a facilitator in Learning Wednesdays, a model for struggling teachers, and a participant in the coaching cycle.

Sarah's relationship with her principal was neither positive nor negative. This neutral relationship was significant, because she was not in a position where she could openly disagree with Gail or share her concerns about the model for Learning Wednesdays. This neutral relationship eventually turned somewhat tenuous, due to what Sarah perceived as a lack of learning and professional growth through the Learning Wednesdays structure. This resulted in Sarah learning little or nothing in her role as co-facilitator for Learning Wednesdays.

Sarah co-facilitated the monthly Learning Wednesday session with another teacher, who was attending Evergreen's science instruction professional development program. The intent of the co-facilitation was for both teachers to structure the group based on what Sarah had learned from CLP and her partner from the district's science instruction professional development program. However, observations evidenced little CLP influence on the Learning Wednesday sessions, because the focus was content area literacy, and specifically on science; the teachers used articles specific to science and content area literacy, which was a different content area from what was covered in CLP. Sarah was not able to incorporate many facilitation strategies she had gained through CLP because of the structure of Learning Wednesdays. Where CLP encouraged building participant feedback into next steps to provide opportunities for buy-in and consistency-building connections between sessions, as co-facilitator Sarah was not able to incorporate these key concepts.

Although science and literacy was the focus, each month the conversations about science and literacy varied. The month between meetings, in addition to multiple grade-level and content differences, was not conducive to maintaining a common focus. It was also not conducive to incorporating the teacher participants into much of the decision-making process when deciding on next steps, because of the large number and varied interests of the teachers. Sarah and her co-

facilitator made the majority of decisions about content and next steps. The common structure of bringing student work and reading a common article remained constant, but the mandated Learning Wednesdays structure was challenging for Sarah to incorporate facilitation concepts she had learned from CLP. Her role as co-facilitator seemed to be more of co-enforcer of the school mandate than true facilitator, since she was not able to incorporate CLP learning into Learning Wednesdays.

Although Sarah's perception of her relationship with Gail and role as co-facilitator for Learning Wednesdays was not fulfilling, her relationship with her literacy coach and opportunities to model and participate in the coaching cycle resulted in positive learning outcomes. Sarah had an especially strong relationship with her literacy coach, Tracy. They had worked together at Valley View prior to Tracy's becoming a coach, and therefore had an established relationship. Tracy recognized Sarah as a model literacy teacher, which led Tracy to bring a struggling teacher to observe in Sarah's class. Sarah's foundation of trust with Tracy allowed her to request that Tracy engage in a coaching cycle with her.

As a model in a classroom lab and participant in a coaching cycle, Sarah was able to reflect on her own instructional practice. Although as a model for a struggling teacher she was in the position of expert, she still appreciated the time to talk through her thinking and take time to talk about what she thought had gone well and what her next steps would be. As a participant in a coaching cycle, she reflected that the outcomes were immediate in the teaching-moment changes to her instructional practice, as well as increased knowledge about teaching and learning through discussion with her literacy coach before, during, and after the lesson.

In reflecting on the year, through these assumed roles and interactions, Sarah came to realize that she valued the time and opportunity to reflect with others on her instructional

practice. These opportunities forced to her stop what she was doing so that she could make changes to her practice. Without these opportunities, she explained, it would have been easy to continue the status quo and not get any better as a teacher. This reflection and interaction allowed her to enhance her practice, or at least plan for how she would improve her ability to lead learning opportunities. She realized that she wanted her role with others to be one where she was available to offer support others, as opposed to being required to support others.

In summary, the culture, structure, roles, and relationships created a learning environment at Valley View that was one of urgency, mandates, directives, and limited choice. Understanding the context in which Sarah was learning and working was integral to understanding the processes Sarah experienced as a learner and aspiring leader at Valley View. In the next section, keeping in mind the context in which Sarah was learning and working, I will analyze Sarah's experiences as she engaged in various processes: dialogue and deprivatized practice, dialogue and inquiry, and dialogue and resource sharing. Dialogue between Sarah and her peers, her principal, her literacy coach, and me as she reflected on her experiences was the vehicle that enabled her to construct meaning from her experiences. These discussions in turn influenced the outcomes of the processes in which she engaged. In the following section I will demonstrate how dialogue and the processes together influenced her learning outcomes.

### *Dialogue and Deprivatized Practice*

Sarah welcomed the opportunity to open up her practice and appreciated the discussions she had in reflecting on her practice. As discussed in Chapter 5, Sarah had been observed and observed a variety of classes through her participation in CLP. In addition to the CLP observations, due to her close relationship with her literacy coach, Tracy, Sarah also had two voluntary opportunities outside of CLP to open up her classroom, during which she discussed

and reflected on her instruction. This next section will examine these; the first was as a model for another teacher and the second was as a participant in a coaching cycle with Tracy.

Tracy's confidence in Sarah's instructional practice and their close relationship contributed to Tracy's decision to bring in a teacher who was encountering difficulties to observe Sarah. The teacher was having especially challenged by the process of doing a mini-lesson and conferring during independent practice. Tracy wanted the teacher to see Sarah teach in order to demonstrate that it was possible to do a mini-lesson and conferring in a literacy block. Tracy also wanted to show the teacher Sarah's recordkeeping system so that the teacher could see how Sarah made the most of her conference time with each student. Although the teacher gained a lot from the observation, it was during discussion with Sarah that he had the better opportunity to learn and reflect. The process of explaining her thinking and structures in her class gave her an opportunity to reflect and be metacognitive about what she did and why. The discussion required her to justify the decisions she made during her mini-lesson and in conferences with her students. During the discussion she also shared what she would have done differently and next steps with her students. Although it was not an opportunity to gain new ideas, it was an opportunity to be metacognitive, reinforcing the skills and knowledge she had, and a structured opportunity to discuss with a peer and the literacy coach what she was thinking about next steps for her students.

The other opportunity that Sarah had to open up her practice was through a coaching cycle with her literacy coach. Sarah explained that she had had a unique experience due to the trust and relationship already established with Tracy. This allowed her to feel comfortable not only while providing feedback before and after observations, but during the lesson as well. The discussions she had prior to the lesson, while planning with Tracy, allowed her to create and

articulate an objective. Through this discussion and articulation process, she realized and shared that she wanted to make the discussions she was having with students more meaningful. That in mind, Tracy was able to jump in during the lesson. This required Sarah to stop and slow down the lesson so that students would have the opportunity to deepen their responses. As she explained in the reflection following the coaching cycle,

I get new lesson ideas. It always helps me with student responses . . . helping with asking students deeper questions to push thoughts. When [Tracy] was here she would say, “Let’s take that comment and have them explain more.” I have become more aware to push them and not just take [what they say] at face value.

Throughout the coaching experience, Sarah discussed in-the-moment decisions or observed Tracy model, talked with her about what had gone well or not gone well, and proposed next steps. Sarah left these discussions with not only new lesson ideas, but also strategies for how to better instruct students and push their thinking. This new awareness of pushing students’ thinking was meaningful, because she selected the focus and received feedback within the context of her classroom during the implementation of her lesson.

Coaching discussions were powerful because they were in the moment, but Sarah explained that observing and being observed and coaching provided equally important but different lessons. She explained how these lessons differed:

I usually will take away CLP and coaching equally. It’s different—coaching in the moment. CLP is meaningful in the bigger picture of literacy, reading, versus coaching is within the specific moment. What I learn in CLP will be applied in the spring or next year. Coaching is immediate. CLP is big picture and something to be used for [the] long-term.

Although both coaching and observations allowed Sarah to reflect on her classroom instruction, the impact of what she learned had different influences on her practice. It is interesting that she believed that coaching in the moment, driven by her agenda, had an immediate impact on her practice, while reflection during CLP sessions resulted in changes that were too complex to implement in the immediate future. The opportunity to discuss instructional best practices was similar—both had the coach involved in structuring the learning opportunities and reflection—but the context of learning impacted how she was able to implement changes in her practice. When she tried to think about what others were doing and new content she had explored through CLP, she had a more challenging time trying to figure how out to implement it immediately into her practice, possibly because the discussions were about general best practices as opposed to the coaching conversations that were specifically about her specific situation. Changing her practice midstream, even mid-lesson as in the coaching experience, seemed to be more easily accomplished when the learning was embedded directly within her classroom. When it was not embedded within her present classroom practice she put off implementation or experimentation until the future.

Sarah's relationships with Gail and Tracy impacted the roles she assumed, which in turn impacted the outcomes to her instructional practice. Through opening her classroom for feedback when she was a model classroom lab or during a coaching cycle, she was provided an opportunity to reflect on immediate changes. Another opportunity for Sarah to reflect on and discuss best practice instruction, deepen her knowledge base related to literacy instruction, and increase her confidence in her abilities as an instructional leader was her participation in the CLP inquiry groups.

*Dialogue and Inquiry*

Sarah selected to focus on vocabulary instruction for her inquiry group within the CLP workshops. This choice was influenced by the context of Valley View, whose population consisted of a high number of ELLs and the school's focus. Observations and discussions with her peers of vocabulary instruction allowed Sarah to gain a bank of strategies to implement in her own practice. Although she reflected that the information she gained from CLP lessons was usually implemented the following year, if the content or ideas that she discussed with her peers were similar to practices in place in her classroom, she was able to make these minor changes to what she was already doing. The culture of urgency at Valley View required Sarah to take action to support the large number of struggling ELL students in her class. Through observation and discussion of what she thought was good practice, as well as opportunities to examine what she considered was not best practice, she made modifications to her practice or intended to make changes the following year.

Considering the large number of ELL students in her class and in Valley View in general, building vocabulary and being intentional about vocabulary instruction was an important component to the success of these students as they enhanced their literacy skills. Through participation in the inquiry group, Sarah had the opportunity to try new ideas in her class and observe and discuss with her peers alternate practices that allowed her to reflect on and enhance her practice. The continual reflection and opportunities to talk with peers about vocabulary instruction throughout the year gave her the opportunity to think critically about her practice and the needs of her students. The outcome was a deeper knowledge of vocabulary instruction, specifically focused on the student population she taught at Valley View. This deepened

knowledge enabled her to make immediate modifications to her instructional practice and armed her with the knowledge to better prepare for the following year.

During her end-of-year reflection, she recognized what was working and what needed more work. Even though she had made some immediate changes to her daily practice, her enhanced knowledge and the opportunity to reflect on what she needed to be more intentional about vocabulary instruction would allow her to change her daily instruction with the start of the following school year. During her written end-of-year reflection, she explained her thought process and learning:

We had an interesting word wall, but after a few months I realized they were not using it. I started teaching them with the help of the coach. Kids could say that they could picture the word better (mean vs. fierce). Ask[ing] them to use words in their writing, for a short story or with partners or with a group, slowly but surely I started seeing even my ELL kids . . . were using [the words] in their writing and using a thesaurus more effectively as well during revision. They knew what words should be replaced and which [should] not. Students could recognize the words were up there and they were not using [them]. [I] needed to not only have them posted, but also teach them to use [them], and give them time with a partner to practice. It was not enough to just talk about the words and have definitions posted. Next year, [I] will incorporate it as part of daily instruction. I am going to put more thought into vocabulary. It made such a difference in their writing and their reading.

Sarah's experience as a member of the inquiry group provided her an opportunity over the course of the year to reflect and discuss with peers who were also focused on vocabulary. She recognized and modified her instructional practice to be more intentional with her instruction

with vocabulary. She realized that for her students, just surrounding them with words was not sufficient. If she wanted them to enhance and build their vocabulary for reading and writing, it was necessary to provide direct instruction on how to incorporate new vocabulary and to provide time to practice using new vocabulary words. Through reading, watching, and discussing best-practice, research-based vocabulary instruction, she made immediate modifications to her instructional practice and had ideas that she was excited about implementing the following year.

Deepening her knowledge of vocabulary instruction through readings and observations in her inquiry study was further enhanced by opportunities to share resources with peers. However, actual implementation with her students solidified what she experienced during CLP and influenced what she would be doing as next steps and what she wanted to do for the following year. Another process Sarah engaged in to deepen her experiences with inquiry groups and deprivatizing classroom practice was resource sharing. At times resource sharing was a part of inquiry groups and observations, but resource sharing also occurred during the learning groups Sarah co-facilitated during Learning Wednesdays at Valley View.

#### *Dialogue and Facilitating Resource Sharing*

Learning Wednesdays was Sarah's opportunity to facilitate resource sharing at Valley View. The outcomes of the discussions in preparation for and during Learning Wednesdays for Sarah as a classroom teacher and a facilitator were influenced by the structure of Learning Wednesdays and what she had learned from her CLP discussions. Outcomes were also influenced by the role she assumed as co-facilitator within the culture of top-down leadership and mandates at Valley View. The outcomes of her discussions during and co-facilitator for Learning Wednesdays were an enhanced knowledge about facilitation and a new belief in what best practice instructional leadership and facilitation should look like.

The discussions with her peers during CLP reflections following observations influenced her beliefs about the important components of PLC facilitation. Following the first CLP session, Sarah reflected on the value of looking at student work. When she and her peers discussed what they thought about the protocol process, they talked about how impressed they were with the protocol, which focused on student outcomes and the value they derived when learning about instructional best practices was gained through observations and discussions that were student-centered. During her reflection on how CLP would impact how she would facilitate her Valley View PLC, she explained:

If I can start having them bring student work it is more meaningful [for] helping them to figure out what their next instructional move [is]. It was helpful to look at student work and have teachers guess your objective was based on student work samples.

Taking this facilitation move from CLP helped to guide how she wanted to impact her small group. Sarah was really impressed with how powerfully a protocol focused on student outcomes helped her with to have meaningful conversations that resulted in feedback and next steps for her practice. When planning the Learning Wednesday agenda, she discussed with her co-facilitator the importance of grounding the discussion in student work. Throughout the year, Sarah incorporated student work into their monthly sessions. A few examples of what teachers brought in were students' KWL charts, science notebooks, or leveled reading text from the science curriculum. Sarah explained that student work helped to ground the work over the grade levels. Since it was a whole school mandate, teachers from various grade levels came together. Student work allowed teachers to see the continuity and differences in the same areas across the grade levels.

Having the opportunity to ground the discussion in student work provided a common entry point for a very diverse group of teachers who were required to do work together. During her reflection she said, "I'm happy to see that lower grades are doing notebooks, so that when they get to upper grades there is consistency. I'm really impressed that people brought things." When I asked her why she was impressed that people brought things, she replied, "Because it is more monitored by the principal." Sarah explained that the benefit of having the mandate for attendance and participation was how diligent teachers were about participation. However, although it was a good opportunity for all grade levels to have a common conversation, Sarah's reflection and discussion with me brought to light the tension of a mandated meeting. Through further reflection and discussion she revealed that although she was hopeful that teachers were taking away lessons from Learning Wednesdays, they were a struggle.

During one of our conversations, she said that one of the struggles she had discussed with her co-facilitator was the fact that the PLC group was only once a month. She explained, "You lose momentum when you only meet once a month." Although the topic of science and literacy remained constant, the topics were different from month to month. Since it was cross-grade-level, they did not have common curriculum to discuss, so they examined science literacy articles. However, teachers did not all read or have time to read prior to Learning Wednesdays, so Sarah and her co-facilitator decided to spend 20 minutes reading and 40 minutes discussing the article and student work. Although the structure was similar for each session, since a whole month would pass between each meeting, it was difficult to have a consistent flow from one meeting to the next. Through facilitating Learning Wednesdays and discussing the outcomes of the PLC with her co-facilitator and me, she learned about what she wanted and didn't want for

future opportunities to lead learning groups. She valued grounding discussions in student work and articles from experts in the field, but she also saw the value of consistency and choice.

Although Sarah co-facilitated a staff PLC and discussed ideas for what she wanted for her next opportunity to facilitate a small group, she did not see herself as an instructional leader. She believed in opening up her practice for others to see what she was doing and bring peers together to discuss practice, but she wanted to be seen as someone her peers could turn to and not an instructional leader. As she explained in her end-of-year reflection:

I don't know that I am an instructional leader. . . . I am hoping, because I won't be told what I am doing for my small group this next year, that it will be more meaningful and voluntary and have more buy-in. Hoping people will come in and ask me questions.

People [would] come in and do observations of my classroom teaching and I would use planning time to support them.

It was interesting that Sarah did not see herself as an instructional leader. The roles that she aspired to—facilitating a PLC for teachers who voluntarily participate, modeling instruction in a class lab, being available to answer questions, and using her planning time to support teachers—were all qualities of an instructional leader. Having an opportunity to share resources with her peers and facilitate conversations related to science literacy best practices provided opportunities for Sarah to reflect on both her instructional practice and her practice as a leader in the building. Although she did not see herself as an instructional leader, her reflections and actions were those of an individual who was taking a leadership role in supporting the improvement of her own instructional practice as well as that of her peers.

In reflecting on the year, Sarah noted that although there were benefits to mandated meetings, her two greatest take-aways from the monthly Learning Wednesdays was the

importance of choice as opposed to mandates and the importance of using student work as an anchor for the conversation. In summary, Sarah's experiences as co-facilitator for the Learning Wednesdays PLC and her participation in CLP sessions fine-tuned her abilities and confidence to lead instructional improvement at her school. In the end, she used these experiences and created a plan for the following year to improve what she did with her class and to support the instructional improvement of her peers.

## Chapter 8: Cross-Case Analysis

In this study I investigated the experiences of two teachers who were participating in a district-wide professional development project called the Collaborative Literacy Project. The aims of this professional development initiative were to create a collaborative learning culture and enhance literacy instruction throughout the district. The theory of action was that through learning together, teacher leaders and their building principals would develop the tools necessary to support the development of effective literacy instructional practice among other teachers in their schools and, in turn, enhance the quality of literacy instruction and student reading and writing throughout the district.

The focus for this study was to examine the development of two aspiring instructional teacher leaders. Both taught the fourth grade, had been teaching for roughly the same time, had had similar CLP experiences, and were well respected by their peers. The difference was the contexts—the culture, structure, and resources—of the schools in which they taught and aspired to become leaders. Using data from interviews with the teachers and their principals, field observations, and document review, I examined the district and school contexts and how the different contexts and processes influenced the outcomes for these two aspiring teacher leaders.

The purpose of this chapter is to address the third research question in this study:

How do processes and contexts contribute to changes in the teachers': (a) knowledge, (b) instructional practice, (c) strategies to lead professional development, and (d) beliefs about knowledge, instructional practice, and strategies to lead professional development?

This chapter will analyze the similarities and differences of outcomes between Halley and Sarah across the contexts as they engaged in the various processes (dialogue, deprivatized

practice, inquiry, facilitating resource sharing). Through analysis across both teachers' experiences, three contexts emerged as being significant to the teachers' outcomes: (a) the structure of CLP, (b) the culture of their schools, and (c) relationships with district leadership and their peers. These contexts influenced how Sarah and Halley engaged in different processes. In this chapter I will describe each of the three contexts and the outcomes that were a result of their engagement with various processes. The context at the district level for the CLP provided similar learning experiences for both teachers. However, their experiences varied due to relationships and the school contexts in which they worked. By investigating the similarities and differences across contexts, processes, and outcomes, we can begin to understand how these two teachers developed their instructional and leadership knowledge and skills over the course of the year.

### *Structure of the Collaborative Literacy Project*

Evergreen School District's CLP provided learning opportunities for all its participants that included observation and discussion guided by protocols, readings and discussion of best-practice literary instruction through the inquiry PLCs (word work, vocabulary, spelling), and the expectation that they would facilitate a study group at their school. Teachers had opportunities to engage in dialogue through deprivatized practice and through the inquiry study. Evergreen allowed teachers and administrators multiple opportunities over time to read, observe, try new ideas, reflect, and discuss best-practice literacy instruction with peers. Whenever possible, learning was embedded in the schools and focused on student outcomes. These opportunities resulted in outcomes that included increased knowledge of best-practice instruction, changed instructional practice, and ideas for how to facilitate resource sharing during the building PLCs.

*Power of student-centered observation and discussion protocols.* The CLP protocol provided a structure for discussions of student-focused observations. Both teachers referenced the protocol as an important resource for observations and discussions. This, in turn, led to teachers' increased knowledge, implementation of new ideas in their own practice, and changes in their beliefs about instruction and instructional leadership. Some of the ideas were immediately put into practice when they went back to their classes. Other concepts were larger scale or not easily implemented into their current practice, but they influenced their beliefs about instructional or leadership best practices nevertheless. These ideas were reserved for planning and implementation for the following year.

In addition to knowledge, changes in practice, and changes in beliefs, the protocol format gave the teachers opportunities to gain confidence and learn strategies for instructional leadership to implement with the small learning groups at their schools. The teachers felt safe being observed because the focus of the protocol was on student outcomes instead of on the quality of the teaching. They could be seen as participants and co-learners as opposed to experts. This increased comfort effected a change in the participants' beliefs about instructional leadership and what it meant to be a model in classroom observation labs. In addition to the change in beliefs about instructional leadership, the protocol-guided observations and discussions also gave the teachers ideas they could implement with their students and ideas they could use in their facilitation of their building-level PLCs. Halley and Sarah implemented ideas that had been discussed when teachers were asked to reflect on the protocol observation and discussion processes. For example, Sarah and Halley had the teachers in their PLCs bring student work samples and guided questions for discussions following readings. The protocol was a tool that made the process of opening up one's classroom less intimidating. Instead of the teacher

feeling scrutinized, the focus was on student outcomes. Participating in the protocol-facilitated discussions and observations gave Halley and Sarah experiences that built their confidence to lead and be observed.

This structure of learning opportunities allowed the district to set common standards of literacy instruction and best practice for facilitating adult learning. Evergreen accomplished district-wide goals and held all participants to the same expectations. Learning was based on student outcomes and grounded in CLP teachers' classrooms. This allowed the teachers to buy into the district process because it was applicable to their own practice. The district goal of fostering collaborative learning to deepen teacher knowledge and enhance instructional practice was met while respecting the needs, interests, and autonomy of individual schools. Halley and Sarah were provided common learning opportunities over time and across settings, with a variety of peers from across the district.

*Inquiry Study PLC.* In addition to the protocol, another aspect of the CLP that influenced the outcomes for Halley and Sarah was the inquiry study. The common structure of the inquiry PLC helped Halley and Sarah develop skills in the areas of facilitation and instructional leadership. However, each school culture influenced the selection of the focus for teachers and led to different outcomes for each of them. The structure of learning in each inquiry PLC was constant for all the participants; the differences were in the content and application in their respective settings.

Participants in the CLP were assigned to an inquiry group, and although the format was consistent across groups, each selected a specific area of word study—word work, vocabulary, or spelling. Throughout the year, teachers read professional articles on their specific inquiry topic, observed lessons on their inquiry topic, and had opportunities to discuss the articles and the

observations with their peers. The result of this structure of learning was similar for both teachers. Halley and Sarah reflected that their discussions of readings and their observations during inquiry PLC sessions yielded knowledge that influenced their beliefs about what quality curriculum and best practices look like. With this new knowledge, they felt they were better equipped to plan for the following year and had the information required of them to be critical consumers of curriculum for their selected areas of study.

Halley selected spelling as her focus because she was piloting a spelling program for Ocean Vista. Since she was following the spelling curriculum, the knowledge she acquired during her inquiry PLC sessions caused her to question best practice, but not to change her own practice. Halley spent a great deal of time over the span of the year questioning her beliefs about best practice regarding spelling instruction. She utilized the spelling program, but was not convinced that the program, by itself, was sufficient. Discussing the readings and observations of what her peers were doing with their spelling programs and how they were incorporating spelling into the workshop model left her with more questions than answers. At the end of the year she felt like she knew what questions to ask and had the beginnings of a plan for spelling for the following year.

Ocean Vista's culture of choice and comfort did not require immediate implementation of change. Spelling was one of three areas of focus for Halley at Ocean Vista. The school focus was math, her PLC was a book study on writing instruction, and she was piloting the new spelling program. Halley's focus on spelling within the context of Ocean Vista did not provide an environment where spelling instruction was a priority. Therefore, although she gained knowledge and enhanced her beliefs about spelling instruction, Ocean Vista's context did not

encourage her to implement what she had learned and modify her instructional practice; as a result, the impact of the CLP knowledge she had acquired was lessened.

Valley View, on the other hand, influenced Sarah's immediate implementation of different vocabulary instruction ideas, which had been her focus in the CLP. The culture of Valley View was one of urgency and mandates because of the pressing need to show improvement in student learning. The large number of ELLs influenced the school's focus on building vocabulary. Even though vocabulary was the school's focus, however, and Sarah had selected it as her inquiry focus, Valley View and its principal, Gail, did not confine Sarah to a single vocabulary program. Without a mandate for a specific curriculum, but rather an immediate student need to develop vocabulary, Sarah made some immediate changes to her instructional practice throughout the year. The modifications Sarah made were those that aligned with her current practice: If new concepts could not be easily implemented into her practice, she did not implement it immediately. Instead, Sarah, like Halley, reflected that a great deal of the information gathered during CLP would inform her future plans. She explained that many of the ideas and concepts they had discussed in the inquiry PLC would influence how she planned to be more intentional with vocabulary instruction the following year.

The inquiry study allowed Evergreen to provide common learning opportunities to accomplish district goals for enhanced literacy content knowledge and to model PLC best practice. However, the decision as to what to focus on and how—if it all—the new knowledge would influence classroom practice was left up to each school and each teacher. The inquiry study was a meaningful learning opportunity because, although it was required by Evergreen, the teachers were allowed to select a focus of study that most appropriately fit his or her situation.

The focus of the inquiry study and how teachers implemented new ideas into their instruction were influenced by the school's needs.

*Expectation to Facilitate Resource Sharing.* The final aspect of CLP that encouraged the development of teacher learning about instruction and instructional leadership was the requirement to facilitate resource sharing in PLCs with school peers. The process of collaborative learning through focused reading, observation, and discussion influenced not only the teachers' knowledge and instructional practice and plans, but also what content to cover and how to lead and facilitate PLCs at their schools. Both teachers took ideas from their experiences with the CLP sessions and implemented them as strategies they used in facilitating their small groups. The small groups at Ocean Vista and Valley View were different in format, and each brought different aspects of the CLP session into their facilitation practices with their small groups.

Ocean Vista's culture of choice and comfort provided an environment where Halley had the opportunity to experiment and try different approaches to facilitation. Halley's principal, Kim, attended PLC meetings as a co-learner and believed that peers should learn from each other. In this environment, Halley was able to select the topic of the PLC and how it would be facilitated. She selected a text for her school PLC that the CLP had used the prior year and started the year off relying heavily on her literacy coach for guidance and leadership. At the start of the year, Halley did not have confidence as a leader and did not feel comfortable determining what and how things should be discussed during PLC sessions. However, throughout the process she developed her facilitation skills. At the start of the year, she was concerned about teacher participation, so she decided to increase the structure of the book group's reading and discussions. One of the first ideas she implemented was to ask guiding questions of teachers.

When she posed these guiding questions, she was happy with the results of the increased participation for all the teachers in her group. Over the course of the book group, Halley relied less on seeing the literacy coach as the holder of knowledge and more on her own abilities and on using the teachers' ideas to guide next steps for the book group.

Valley View's culture of urgency and mandates influenced the structure of Sarah's PLC and the leadership role she assumed. Gail, the principal, had set certain expectations and, within those expectations, Sarah incorporated aspects she had learned from CLP into her instructional leadership practice. However, due to the highly structured expectations already outlined for Learning Wednesdays, there was little choice as to what or how Sarah facilitated these sessions.

Sarah was very impressed by the power of student-focused conversations. During each Learning Wednesday session, she had teachers read professional articles either prior to or during the session and requested that the teachers bring examples from their classes to each session. Similar to the CLP sessions, Sarah and her co-facilitator grounded their conversations in both new ideas from professional readings and what teachers were already doing in practice.

The Evergreen and CLP structure of deepening knowledge through collaborative learning influenced how Sarah and Halley facilitated their small groups. The strategies they implemented to lead their small groups were gained from ideas they had experienced in their CLP sessions. The small group learning opportunities at the two schools differed in structure and content, but both teachers were able to take strategies and apply them to their situations at their schools.

The CLP was based on a theory of action that hypothesized that if teachers and administrators were given an opportunity to deepen their learning about best-practice literary instruction through collaborative learning opportunities, they would in turn provide similar opportunities for teachers in their respective schools, with the end result being enhanced student

learning throughout the district. The Evergreen culture, influenced by Draft 5, required that the CLP recognize the importance of the needs of individual schools and site-based decision-making. The structures in place at the district level facilitated learning opportunities and the kind of support that Halley and Sarah would not have had if they had not participated in CLP. Their common experience with the protocol contributed to productive general outcomes for both Halley and Sarah. These results speak to the importance of systems that create common and collaborative learning opportunities that are focused on student-centered outcomes.

### *The Culture of Ocean Vista and Valley View*

The culture of both schools influenced the decisions that the teachers made and the outcomes of various processes across both settings. Each school's culture and its principal's leadership were closely intertwined, which made it difficult to decipher how they influenced each other. Since the demographics, school culture, and principal leadership were all closely interrelated, this section will examine how these cultures and processes interacted to influence the outcomes for Halley and Sarah.

Ocean Vista's demographic was affluent, homogenous, and high-achieving. Valley View's demographic was diverse, with one of the district's largest percentage of ELLs and students qualifying for free and reduced-price lunch; test scores were below expectations, and the school was struggling to address the needs of all students. The differences between Ocean Vista and Valley View were more than just the differences in the schools' demographics. The difference in leadership at the schools also contributed to the different cultures.

Ocean Vista's principal, a veteran in the district, had a focus on building a collaborative peer learning environment for the teachers in the school and, in support of this, she was an active participant in the small groups that Halley facilitated. She prioritized and directly supported her

belief that adults should choose to learn together and peers should be coaching each other. On the other hand, Valley View's principal, who was new to the school and the district, was struggling to establish herself during her second year as an administrator. To support the small group facilitated by Sarah, the principal made "Learning Wednesdays" part of mandatory weekly staff meetings. In order to support the school-wide improvement plan focused on content area reading and ELL, Sarah and her co-facilitator led a Learning Wednesdays PLC that focused on science literacy.

*School context influence on the focus of inquiry study.* The general outcomes for both Halley and Sarah were similar in their acquisition of knowledge and the outcomes based on this enhanced knowledge. The specifics of what they learned were influenced by the topic of study they had selected. Halley chose to focus on spelling, since she was piloting a new spelling program for her school. Sarah chose to focus on vocabulary, because it was the focus area for Valley View and directly addressed the immediate needs of the high number of ELL students in her class. Their school contexts influenced both their selection of a PLC focus and experiences with the inquiry topic.

Ocean Vista's culture of choice and comfort influenced what Halley took away from her participation in the inquiry group on spelling. Spelling was an obvious choice for Halley, since she was one of the pilot teachers of the spelling curriculum at Ocean Vista. However, since she was piloting the program, modifications were more challenging. Halley followed the spelling program throughout the year except when she took a break from spelling during the time preceding the state assessment. There was not a sense of urgency to make immediate changes to her spelling program, or to even teach spelling during a part of the school year. She explained

that the learning she gained from the inquiry focus and the struggle with having or not having spelling lists would be one she would focus on in the following year.

Sarah, on the other hand, worked in an environment where her personal focus aligned with the school's urgent focus on vocabulary. The immediate implementation of new strategies for vocabulary instruction was necessary for the large number of ELL students under her instruction. Over the course of the year, Sarah was continually modifying her word wall and how she had her students interact with vocabulary. In addition to these changes, at the end of the year she, like Halley, had ideas that she hoped to implement the following year. Sarah took both the new ideas she had gained through her inquiry study and the information she gathered based on what her students had accomplished over the course of the year to influence how she wanted to implement a more intentional and daily vocabulary component the following year. The urgency of students' needs at Valley View influenced both Sarah's immediate implementation and long-term plans for vocabulary instruction.

The school context influenced not only what the teachers selected as their focal area, but also how they implemented their learning into practice. Both teachers had a better picture of how they would teach spelling or vocabulary the following year. However, Halley's experiences influenced only her long-term plans, while Sarah's experiences influenced both immediate implementation and long-term plans.

*School Culture and the Role of Facilitator.* The different cultures at Ocean Vista and Valley View led to different roles for Halley and Sarah as facilitators of their small groups. Ocean Vista and its principal, a supporter of Draft 5, fostered a learning community whose foundation was that teachers would learn best if they were allowed to choose to work and learn collaboratively. Halley's small group consisted of the principal and a voluntary group of four

teachers who met weekly or every two weeks to discuss readings from *Wondrous Words* by Katie Wood Ray. Sarah's small group at Valley View, in contrast, aligned with Valley View's culture of urgency and mandates. Sarah's monthly Learning Wednesday group consisted of seven teachers and her co-facilitator, all of who were mandated to participate because their meetings were a part of the Wednesday staff meetings. The outcomes for Halley and Sarah were as different as the cultures in which they facilitated their PLCs.

Halley's experience as the facilitator of the voluntary book group enabled her to grow both in skills and confidence as a teacher leader. At the start of the year, she relied heavily on the literacy coach as leader, but by the end of the year she reported that, based on her experiences, she felt like she was a critical consumer of professional development. When she went to professional development sessions, she took away ideas for her instructional practice and learned how to conduct professional development by asking herself, "What is going on here?" Over the course of the book group, she learned the importance of guiding questions and having an objective for adult learning. The idea of asking, "What is going on here?" wasn't focused on the content that was being covered, but rather on how the facilitators were structuring the learning opportunities. The opportunity to learn through trial and error with her book group had a powerful effect on her understanding and beliefs about adult learning and strategies to lead her peers in learning.

Sarah's experiences with the mandatory Learning Wednesdays PLC confirmed her beliefs about best practice for facilitating peer-learning groups. Sarah had conducted voluntary groups in prior years and reflected that she was ready for the following year, when she could have a group where teachers chose to participate. She appreciated teachers' practice of coming prepared to Learning Wednesdays sessions, but attributed this to the principal's monitoring of

teacher participation and not to teacher interest. Another struggle for Sarah was that Learning Wednesdays occurred just once a month. The one-month break between sessions did not allow for consistency and broke up the learning for the group. Sarah's experience co-facilitating Learning Wednesdays led her to conclude that the process was not the most effective or efficient way to facilitate a PLC. However, through reflection on her experiences, she formulated a plan for how she would organize and facilitate the following year's PLC at Valley View.

Both Halley and Sarah's experiences facilitating PLCs at their schools were influenced by the school culture and roles they either chose or were required to assume. The outcome for both teachers was a clearer understanding of their beliefs about effective strategies for leading PLCs. Halley had an opportunity to develop her skills and beliefs based on trying different strategies. Working with a supportive principal in a school culture of comfort and collaboration, she was able to learn through trial and error. Her role as facilitator in this context allowed her to be a co-learner alongside her principal and peers. On the other hand, Sarah developed her beliefs through reflecting on the challenges of the mandated sessions. In a culture of mandates and urgency, Sarah was bound to a highly structured framework and did not really have an opportunity to explore literacy practices in greater depth. Instead, her role as facilitator at Valley View was as an implementer of district and principal expectations. Both teachers' experiences were influenced by the school culture and role they assumed as facilitator of the building PLC.

### *Relationships with District Leadership and Peers*

In addition to CLP structure of CLP and the culture of each school, the relationships Halley and Sarah had with their literacy coaches and peers influenced the depth of discussions and interactions throughout the year. Their relationships with the literacy coach influenced opportunities to deprivatize their practice, and their relationships with their peers impacted

discussions during their PLCs. Supportive peer relationships impacted the depth of learning that the teacher leaders engaged in. Engaging in these relationships contributed to teachers' increased knowledge and changes in their beliefs and instructional practice. Sarah and Halley had different experiences with their coaches and peers.

Sarah had a close relationship with her literacy coach, who had worked with Halley at Valley View prior to taking her position as one of the district's literacy coaches. Their familiarity with each other influenced the number and types of opportunities Sarah had to open her classroom. Both Halley and Sarah had the opportunity to model instruction during the CLP as a class lab for a group of teachers, but because of the familiarity between the coach and Sarah, Sarah also the opportunity to have a struggling teacher and the coach collaboratively observe her teaching. This was an additional opportunity for her to reflect on her practice and discuss her thinking with a peer. The other opportunity that Sarah had was her opportunity to engage in a coaching cycle with the literacy coach. Their established relationship and trust was foundational to Sarah's in-depth examination of her practice. Through the coaching cycle, Sarah had the opportunity to talk through her thinking and get feedback on planning, implementation, and next steps. The outcomes of this close relationship and deprivatizing her instructional practice were increased knowledge of literacy best practice and improved instructional practice. Sarah's relationship with the literacy coach opened doors and learning opportunities that other teachers did not have.

Halley also had a good relationship with her coach; however, it did not yield the same type of opportunities as Sarah had. Halley's coach helped to facilitate the CLP learning lab where she modeled for her peers. The coach facilitated the discussion of Halley's instructional practice, which established Halley as a model teacher. This created an opportunity to position

Halley in a leadership role at the school. Halley's relationship with her coach was mainly to ask questions or seek clarification. Halley saw the literacy coach as the holder of knowledge rather than a collaborator. During the book session PLC, Halley deferred facilitation to the coach. However, once she started using guided questions, Halley no longer expressed a need to contact her coach. In fact, over the course of the PLC, Halley gained confidence as a facilitator. Halley's relationship with the coach helped to set the foundation for her to assume a leadership role at Ocean Vista. Although she had relied on her coach at the start of the year, she became more independent and confident as a leader as time went on, because she had the opportunity to try new ideas. Halley also had the support of her peers in her building-level PLC; they volunteered to participate, and attended the PLC sessions on a regular basis. The positive peer relationships with her school PLC and the foundation set by the literacy coach gave Halley the confidence to lead.

While Halley had supportive peers who voluntarily attended the book group, Sarah's peers did not have a choice in their attendance of Learning Wednesdays. In both PLCs, the teachers followed through with expectations, but observations indicated that Halley's group of supportive peers created a learning environment that resulted in significant learning. On the other hand, Sarah's mandatory Learning Wednesdays group mainly resulted in compliance with whatever Sarah or her co-facilitator requested of the teachers. When asked to reflect on learning outcomes, Sarah reported that she did not feel like she had learned anything substantial. The structure and context set the stage for the relationships between peers and the teachers. This, in turn, impacted Halley and Sarah's learning outcomes.

Relationships between teachers and their coaches influenced the depth of learning outcomes for Halley and Sarah. The coaches for both teachers were a source of knowledge and

guidance. Having the opportunity to be observed and to observe instruction were powerful learning opportunities for both Halley and Sarah. The protocol provided a structure in which teachers could gain more knowledge and change their practice, and afforded experiences that influenced their beliefs about instruction and instructional leadership. Their relationships with their literacy coaches and peers also influenced their experiences and opportunities to observe and be observed. Halley's coach could answer questions, but Halley did not tap into her coach as a resource beyond the class lab opportunity and inviting her to the book group. On the other hand, Sarah's close relationship with her literacy coach provided additional opportunities for observation and reflection. These additional opportunities increased her confidence with observations and use of the observation protocol.

The relationships between Halley and Sarah and their peers influenced their beliefs about themselves as leaders. Both Halley and Sarah had positive interactions with the peers in their PLCs, but neither of them wanted to be in the role of expert or even be considered the leader of the group. Both teachers reflected that it was important that they were co-learners with their peers. The relationship between the teachers and their peers in their PLCs was important because although Halley and Sarah assumed leadership positions and acted as facilitator or instructional leader of their respective PLCs, they were uncomfortable with the title of instructional leader. This delicate balance of assuming leadership while still negotiating a sense of equality with their peers was important to Halley and Sarah. Their denial of a hierarchical structure in roles also influenced the learning they took away from their group experiences. Halley was a co-learner and learned a great deal from her peers about content as well as process. Sarah's role was one of implementer of school expectations, and so she did not deepen her knowledge or build her instructional leadership practice.

Relationships within the context of the school cultures were influential in the teacher outcomes. These relationships shaped the type of experiences each teacher had and, in turn, their depth of learning. Relationships alone or context alone did not influence the outcomes. For each teacher, their relationships within their respective context influenced the roles they assumed, the learning structures they created, and the outcomes for their learning and professional development.

### *Summary*

The district's CLP protocol, relationships with district leadership, and the culture of their schools influenced Halley and Sarah's increase in knowledge, instructional practice, strategies to lead, and beliefs about instruction and instructional leadership. The resources and opportunities afforded by Evergreen's CLP were conducive to building instructional leadership skills for both teachers in this study. Without district involvement and resources, the teachers would not have had access to common collaborative learning opportunities with teachers and administrators from across the district, nor the time and resources necessary to build knowledge and provide experiences within their own buildings. Equally important was the schools' contextual influences. Each school's culture and the leadership by its principal influenced the role each teacher assumed and the structure of the PLC she facilitated. The CLP and district influences set the foundation for Halley and Sarah's experiences and growth as instructional leaders, but their respective school contexts influenced how and when they were able to implement what they learned into practice as classroom teachers and instructional leaders.

## Chapter 9: Discussion

The purpose of this chapter is to discuss the findings of this study of two aspiring teacher leaders, to consider implications relating to these findings, and to identify the limitations of the study. This study explored how the district and school contexts and the processes the teachers engaged in influenced the outcomes of their experiences. In the next sections, I explore two propositions that address the study's research questions, drawing on the analysis of individual cases and cross-case themes in relation to the literature on teacher leadership. This discussion of the propositions and related implications is followed by study limitations and recommendations for further research.

*Proposition 1: Systems that support teachers' as instructional leaders need a balance of top-down and site-based decision making.* The results of this study substantiate prior research that found that a culture with a system-wide focus on learning, inquiry, and reflective practice, as well as expectations for shared decision-making and encouragement to take initiative, were facilitators for teacher leadership (York-Barr & Duke, 2004). Evergreen's CLP attempted to balance site-based decision-making and the guidelines of Draft 5 with top-down district systems and expectations that required a common, system-wide focus on literacy instruction. This study found that participation in the district-level CLP provided support for teachers when school administration did not or were not able to offer this support. The specific CLP components that allowed for a balance between district- and site-based decision-making were (a) the inquiry study, (b) the allocation of time and resources, and (c) the protocol for observations and discussions in the district PLCs.

The inquiry study activity was one example a CLP requirement that facilitated teacher leadership through a process that balanced district priorities with the needs of the building. The

CLP inquiry study confirmed prior studies that found that a hierarchical structure could be diminished by supporting teachers to engage in inquiry and reflection (Elmore & Burney, 1997; Holmes Group, 1990). Inquiry and reflection were fostered through Halley and Sarah's participation in inquiry-focused PLCs. By means of the district-level inquiry PLCs, responsibility, power, and expertise were distributed among teachers (DuFour & Marzano, 2009; Little, 1993).

Although the inquiry PLC was a district requirement, the culture of the individual schools and their students' needs had the authority and support of the district to influence the inquiry topic the teachers selected. The inquiry study was a meaningful learning opportunity because although it was an Evergreen requirement, teachers were allowed to select a focus of study that most appropriately fit their situation. The focus of the inquiry study and how each teacher implemented new ideas into her instruction were influenced by her school's needs. Halley was piloting the spelling program for Ocean Vista, so she selected spelling. Sarah's high population of ELL students and Valley View's focus on vocabulary instruction influenced her decision to focus on vocabulary. The outcomes that were a result of Halley and Sarah's participation in reading, observing, and discussing were increased knowledge that influenced long-term change in beliefs about teaching and learning, and, for Sarah, knowledge that resulted in immediate changes to her class practice. So although the CLP was a district initiative, the process of inquiry study through PLCs defused the hierarchical mandate by providing an opportunity for school-level decision-making and distribution of power to principals and teachers as they facilitated their own learning about topics significant to their respective schools.

Another example of the interaction between top-level district decisions and school-level decision-making was how the CLP allocated time and resources. The district mandate was to

have the teacher leaders work with their principals to establish building-level PLCs. To support schools in establishing PLCs, the district offered to pay teachers extra time to participate in them. However, decisions as to how buildings utilized or did not utilize these funds and how they structured PLCs remained up to the individual school. At Ocean Vista, Kim and Halley decided that they would create a PLC in which teachers could choose whether to participate in a book study of *Wondrous Words*; Ocean Vista teachers volunteered to participate in a PLC that focused on writing instruction and were paid for their extra time by the district. In contrast, Valley View structured their PLC time so that all teachers had to participate during Learning Wednesdays. The principal, Gail, decided that all teachers needed to be in a PLC one Wednesday a month, and declined to draw on district resources to pay teachers for their extra time. Although the district mandated that schools have building-level PLCs, this decision-making power was balanced by leaving PLC content and structure and the allocation of extra pay up to each school's leadership team.

Use of the student-centered protocol was also required by the district's CLP. Schools, however, were not required to use the CLP protocol; they had the option to decide if, when, and how it would be used in building-level PLCs. The CLP's student-centered protocol allowed the district to accomplish their objective of having teachers open up their classrooms, reflect, and provide feedback. It helped Halley and Sarah become comfortable with an observation process that was focused on student outcomes, which increased their confidence as instructional leaders. Given the contexts of Ocean Vista and Valley View, Halley and Sarah (along with their principals) made different decisions about how they used components of the protocol-guided observation and discussion process.

Valley View did not directly use the protocol, because Sarah's PLC did not do classroom observations. The principal's decision was to instead require all teachers to participate in Learning Wednesdays. This was the primary venue for Sarah's leadership work in the school, and she had little flexibility to apply components of the protocol to her work at Valley View with her peers. Nevertheless, the protocol helped Sarah see the value of looking at student work and she asked all the teachers to bring samples to focus their discussions during Learning Wednesdays conversations. Halley used the focus on student work in the same way during her professional development book study group. She asked teachers to select one aspect from the reading to implement in their classrooms and then asked them to bring samples of student work to the group. In addition, she and the district literacy coach used parts of the protocol when Halley opened her classroom for observation by her school colleagues. So although the protocol was mandated for the CLP participants, the school made individual decisions about what and how the protocol would influence school-based practices.

There was a delicate balance that CLP struck between top-down, centralized decision-making and site-based decision-making. Although requirements were placed on the teachers and their schools, choice was embedded within the requirements. The schools made the decision as to the structure of the PLCs, how they allocated funds for PLCs, and how they implemented components of the district protocol into their building-level PLCs. Thus, the district was able to influence learning and changes across the district while still respecting Draft 5 and site-based decision-making. An initiative's capacity to facilitate teacher leadership depended less on whether the decision came from the "top" than the opportunity for principals and building level leadership to have choice in how to implement district common expectations.

*Proposition 2: Positive relationships and aligned priorities among district leadership, building principals, and teacher leaders promote the growth of an instructional teacher leader.*

The experiences of Halley and Sarah over the course of the year align with prior research indicating that in order to build instructional leadership skills, teachers need opportunities to nurture relationships with the administration and to learn how to navigate more global perspectives—for example, regarding professional development learning objectives or decision-making at the building or district level (Silva et al., 2000). For example, specific structures that fostered relationships and increased learning (Morgolis, 2009) were also evidenced through this study. These structures included Evergreen’s provision of time and resources for teachers and their principals to have common learning that included reading, observations, and discussions. These learning opportunities extended across time and setting and included a variety of voices from across the district. Halley had a positive and supportive relationship with her principal and with district leadership; at the end of the year, she collaborated with her principal on next steps for literacy professional development at Ocean Vista.

Sarah’s relationship with her principal was not negative, but their visions for professional development were not well aligned. Fortunately, Sarah’s close relationship with her district literacy coach, additional learning opportunities over the course of the year, and her positive CLP experience gave her tools and supports that enabled her to independently plan next steps for literacy professional development at Valley View for the following year. However, without principal collaboration on her plans for the following year, the probability of Sarah’s successful implementation of her plan was slim. Without principal collaboration and support there is no guarantee that the learning opportunity will fit into the professional learning plan for the rest of the school. Without this support, teachers—even if they are interested and want to learn—may

not want to put forth the extra effort to participate in a learning initiative that could be on a completely different topic than the course of study being focused on at the school level. Without another person to share ideas, especially the principal who was ultimately in charge of setting the learning agenda and tone for the school, Sarah's plan was not as strong as it could be, given the opportunity to collaborate. The relationships Halley and Sarah had with their principals impacted the development, quality, and probability of successful implementation of a professional development plan for the following year.

The principal at Ocean Vista believed in creating a culture of collaborative learning. Halley's relationship with her principal was one of co-learner. Her book study consisted of the principal, three or four other teachers, and herself. Observations revealed that the principal not only believed in and supported teachers learning together in professional learning communities, but she translated her beliefs into practice and was a regular participant learner alongside the teachers in the book study. The outcomes for Halley as a facilitator and co-learner in the book group was an increase in knowledge of and ideas for writing instruction as well as a change in her practice as a teacher and instructional leader. Additionally, Halley's experience as a facilitator of the PLC book group influenced her beliefs about the importance of structured, student-focused reflection and discussion opportunities with peers. This influenced Halley's collaboration with Kim in planning for optional PLC opportunities focused on student outcomes for the following year and how these would align with the school's literacy focus.

Through her positive relationships with her principal and positive experience with district leadership and the CLP, Halley was able to collaboratively create a plan for the following year for her literacy PLC as well as Ocean Vista's building-wide literacy professional development. The end result was a plan for Halley's PLC for the following year that was aligned with a

literacy professional development plan that had been collaboratively created and supported by both Halley and the building principal. The probability of success for Halley's plan is high, because it is aligned with the school's professional development initiative and has the support of the principal.

While Halley's positive relationship with her principal allowed her opportunities to learn and grow as an instructional leader, Sarah's relationship with her district literacy coach allowed her additional opportunities to enhance her instruction and instructional leadership practice. Due to her close relationships with her literacy coach, in addition to her opportunity to be a model in a class lab CLP session, Sarah had two other optional observation opportunities. The first was as a model for a struggling teacher and the second was her participation in a coaching cycle. These additional opportunities to deprivatize her practice provided her additional opportunities to reflect and talk with others about what was going well and next steps for instructional improvement. It was fortunate for Sarah that she had this relationship with her district literacy coach, because her relationship was not as strong with her principal. Just as the positive relationship with her coach yielded her opportunities to learn, the tenuous relationship with her principal yield limited positive opportunities to learn and lead.

Valley View's culture of mandates and urgency contributed to the tenuous relationship between Sarah and her principal. Mandated attendance at Learning Wednesdays meant that all teachers were required to participate in collaborative learning opportunities; however, observations revealed that Sarah did not get a great deal of learning out of Learning Wednesdays. Sarah thought that her Learning Wednesdays experiences were examples of what she believed were non-examples of best practice professional development. Although the principal was trying to support Sarah so that teachers would participate in her PLC, the experience actually

demonstrated to Sarah how she wanted to do things differently the following year. Sarah's district-level relationships and participation in the CLP provided the support and confidence she required to look beyond the tensions in the Learning Wednesdays and create plans for the following year. Unlike Halley, Sarah's plans for the following year were independent of Valley View's professional development plans. The end result was a plan that Sarah created, which may or may not align with the school's literacy professional development plan for the following year.

Halley and Sarah's experiences support prior research that overall, positive professional relationships and peer networks are essential for teachers to be effective leaders and for learning to be facilitators among their peers (Achinstein, 2002; Crowther et al., 2002; Elmore, 2005; Little, 1993; Silva et al., 2000). If the relationships cannot be nurtured at the school level, it is important that they are nurtured through other means. As evidenced with Halley and Sarah, principal relationships are influential, but relationships with district leadership can help counteract a possible negative or nonexistent relationship between teachers and their administrators.

Addressing the research questions by following Morgolis' (2009) framework of examining the context, process, and outcomes was helpful in understanding how Halley and Sarah's classroom instructional practices and instructional leadership evolved over the course of the year. Specifically, the two propositions address the final research question, which is:

*How do these processes and contexts contribute to changes in the teachers': (a) knowledge, (b) instructional practice, (c) strategies to lead professional development, and (d) beliefs about knowledge, instructional practice, and strategies to lead professional development?*

Both Propositions 1 and 2 express how the outcomes are influenced by the complex interplay between district and school contexts and the processes that the teachers engage in extend across both contexts. Without this district intervention and focus, the teachers would not have had the guided common learning opportunities that allowed them to modify their beliefs about instructional leadership, increase their confidence as models, and enhance their knowledge and practice regarding literacy instruction. The balance between top-down directives and school-level decision-making created opportunities for learning that was meaningful and relevant while accomplishing district goals. The first proposition was the importance of balancing district or top-down and site-based decision-making. The second proposition was the importance of relationships and alignment among district, building, and teacher leadership promoting the learning experiences for teachers. Both the district and school contexts and relationships influenced the processes in which teachers engaged to develop their knowledge, instructional practice, and beliefs. Without district-level resources and opportunities, schools would be left to their own isolated learning opportunities. The CLP was able to balance district initiatives while still grounding classroom learning in teacher interest. These learning opportunities, guided by teacher interest and based on student outcomes, enhanced the rich learning opportunities provided at the district level. Relationships with administration, be it principals or district central leadership, influenced Halley and Sarah's opportunities to lead and grow their instructional and leadership skills.

### *Limitations*

There are several limitations to this study. First, the data for this study were limited to the two teachers and therefore may not have adequately sampled the range of experiences of other aspiring teacher leaders who participated in the district-designed Collaborative Literacy Project.

These two teachers were also selected by district leadership for me to follow and not selected randomly. If additional teachers were selected randomly, a broader range of contexts, processes, and, therefore, outcomes may have been observed.

A related limitation is the confounding of a new principal with weak relationships in a low achieving school compared to an established principal with strong relationships in a high achieving school whose context which afforded less pressure and more choice. This study did not allow for an opportunity to examine what could have happened for teacher leaders if their principals were at the opposing schools. Furthermore, I did not examine how the larger community (parents, community supports, etc.) may have contributed to the resources and structures and sense of urgency in each school. Research suggests that these larger community aspects are likely to influence outcomes.

Second, my presence as a researcher provided an additional opportunity for the two teachers to reflect on their experiences and what their students were learning. This additional reflection opportunity with me may have encouraged them to make an additional effort or may have brought to their attention learning that they may not have encountered without the additional opportunity to talk with me. Without the reflection opportunity they may not have made the same effort nor had the same insights.

Third, I relied on teacher invitation to attend sessions, and sometimes the teachers did not remember to invite me or I could not make a set time. Since I was not able to be at all PLC sessions at the schools, I missed some of the opportunities to observe activities the teachers referred to during our interviews. As a result, my perception was based solely on what the teachers reflected; I could not compare their reflection with my observation. Not being at all the sessions, I could not ask follow-up questions to gain a richer picture of the experience.

Finally, this was the third year of a five-year initiative. I did not have baseline information on where Halley and Sarah were when they first started the CLP, nor do I know where they ended up at the end of the five-year program. Although I had evidence of their growth over the course of this year, this was impacted by their participation in the prior two years of CLP. My analysis was only focused on the teachers' knowledge and insights at the start of the school year and the contexts and processes they experienced throughout the year. I did not examine their experiences through the entire CLP initiative.

### *Further Research*

At a time when teacher collaborative learning and instructional leadership are key components of many district and state policies, this study has yielded two recommendations for further research. The first recommendation is to examine how districts are attempting to balance district- and site-based decision-making in an era of "Race to the Top" and top-down reform. The second recommendation is the importance of investigating instructional leadership in schools in which the cultures and pressures of accountability are quite different.

The CLP attempted to balance the district agenda with the needs of the individual teachers and schools. At the time of this study, Evergreen had funding for a five-year CLP initiative. Since the time of this study, funding across the nation has decreased. When educators have to do more with less and have strict national and state accountability expectations, we need to know more about how districts are creating opportunities to foster instructional leaders. How are top-down mandates being balanced with growing teacher instructional leadership? It would be interesting to investigate which districts are successful at finding the balance and what are they doing that make them successful.

Both Halley and Sarah had positive relationships that impacted their learning. These positive relationships were a result of their participation and relationship-building through the district PLC. Although they came from different schools, they both gained skills, knowledge, and confidence as instructional leaders through a common CLP experience. How do districts create and maintain systems that support all teachers to access instructional leadership opportunities regardless of school context and administration? In a culture of urgency, do administrators and teachers need additional time to plan and build relationships? How are administrators, specifically those in schools whose student population necessitates a sense of urgency and immediate action and reaction to crisis, able to build relationships and create genuine opportunities for teacher leadership? It would be important to investigate what administrators at the district and school levels are doing to build these meaningful relationships and offer productive leadership opportunities.

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