

‘The Ripple Effect of Teacher Leadership’

***A Case Study of Three Teacher Leaders
in a Semi-urban Secondary School in
KwaZulu-Natal.***

By

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DECLARATION

I, **Padmaloshni Moonsamy** declare that the work presented is my own. Any references to work by others are duly acknowledged.

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I dedicate this dissertation to my mum who taught me the values of self discipline and perseverance and who has always encouraged me in my quest for knowledge. I wish to thank my children Sejal and Kaden and my husband Clive for their unconditional love and support and for the personal sacrifices they had to make for me to complete this dissertation. I also wish to thank my supervisor, Ms Callie Grant for her detailed feedback and comments and her words of encouragement. I owe you a debt of gratitude.

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ABSTRACT

The vision of education policies in South Africa, post 1994 is to shift management practices from traditional autocratic headship to a multiple-leader perspective where leadership is dispersed across the school organization. Within this distributive perspective of leadership lies the notion of teacher leadership. However, the conceptual understanding of teacher leadership is still in its infancy in South Africa and, of even greater concern is that the practice of teacher leadership is not deeply rooted in the culture of many of the country's schools. Theorizing from a distributed leadership framework, this small-scale study examines teacher leadership in action. The purpose of the study was to examine how teacher leadership was enacted and to explore those factors that enhanced and hindered this enactment in the case study school. The study was conducted within a qualitative interpretive paradigm and took the form of a case study of three post level one teachers and their enactment of leadership in a semi-urban secondary school in KwaZulu-Natal. Data collection techniques included semi-structured individual interviews, a focus group interview, self-reflective journal writing, questionnaires, observation and document analysis. Data were analysed using thematic content analysis. Grant's (2008) zones and roles model and Gunter's (2005) characterisation of distributed leadership served as analytical tools in the study.

The findings of the study revealed that teacher leadership manifested itself in both formal and informal leadership roles across all four zones in the case study school. While most leadership roles were delegated by the SMT, the enactment of teacher leadership within a delegated distributed framework acted as a catalyst to inspire teacher leaders to initiate emergent and autonomous teacher leadership. A collaborative school culture and the representative power of democratic school structures were key factors in the enhancement of teacher leadership. Leadership skills are important, as are personality traits that demonstrate intrinsic values of courage, trust and confidence to lead. The study identified autocratic headship, an egalitarian ethos, and a lack of time to lead as contextual barriers to teacher leadership. External barriers included frequent policy changes and innovation overload. The study concluded that the enactment of teacher leadership takes on a holistic perspective in that the various leadership roles in the different zones of the model are interconnected and influence each other. This study acknowledges the power of the ripple effect of teacher leadership. Teacher leadership development requires deliberate action from the SMT to provide leadership roles for post level one educators within a collaborative school culture.

CHAPTER ONE

BACKGROUND AND INTRODUCTION

1.1 INTRODUCTION

The aim of this dissertation is to describe how three post level one educators enact teacher leadership roles within a distributive leadership framework in a semi urban secondary school in KwaZulu-Natal. The study also examines the factors that promote and hinder teacher leadership development in this particular school context.

In this chapter I introduce the research topic and the research questions, underlying the study. This is followed by a discussion on the background of the South African education system which forms the backdrop for this research study. Thereafter, I present the research rationale, the research design and the conceptual framework that guides the study. I conclude the chapter with a brief outline of the contents of the subsequent chapters.

1.2 BACKGROUND TO THE STUDY

1.2.1 South Africa's educational landscape

During the apartheid era, the education system in South Africa was characterized by hierarchical organizational structures and bureaucratic styles of management. Prior to 1994, "educational policies manifested themselves in discriminatory laws and practices" (Moloi, 2007 p.463). The extensive range of education policies which emerged after 1994 reflect the government's commitment to change (Moloi, 2007). Over the past decade, the South African education system has experienced a proliferation of education policies and legislation that are aimed at redressing the inequalities that were perpetuated during the apartheid era. "National policy frameworks and legislation advocate that governance and management needs to be re-conceptualized at all levels of the education system, especially at school level" (McLennan and Thurlow, 2003, p.2). The vision of The Task Team's Report on Education Management Development (1996) is that schools become self-managed. New education policies call for the decentralization and devolution of power throughout the school organization. The Task Team's Report on Education Management Development (1996) also highlights that the processes of educational reform are premised on assumptions of participatory modes of democracy (Carrim, 2001). This is because policies are more effective when they allow for maximum participation. Schools cultures that focused on dependency

should transform into cultures that value autonomy and empowerment. In line with this Steyn and Squelch make reference to the 1995 White Paper which states that, “the principle of democratic governance should be reflected at every level of the system” (1997, p.1).

However, McLennan and Thurlow argue that “the situation at the present is that while the vision for transformation is set in the policy framework, the system is still shaped by the ethos, and procedures inherited from the apartheid past” (2003, p.2). Furthermore, evidence emanating from studies conducted by Bush (1995); Steyn and Squelch (1997), Chisholm (1997), as well as Sayed and Carrim (1997) point to an obvious tension between policy and practice. Similarly, Harley and Mattson (2002, p.284) argue that:

Policy in South African education tends to fall into the trap of social meliorism, where commitment to a vision of what *should be* clouds the ability to consider *what is*, so that good intentions of the social reconstruction have more influence on the policy agenda than social and school realities.

Jansen is of the opinion that “dramatic policy announcements and sophisticated policy documents continue to make no or little reference to the modalities of implementation” (2002, p.202). I believe that this policy–practice gap can be attributed to a lack of support structures at all levels of the education system as well as an oversight on the part of policy makers who adopt a “one size fits all” mentality when formulating education policies. Harley and Mattson write that “education under apartheid encouraged teacher conservatism and compliance, new legislation increases teacher autonomy and professional discretion” (2002, p.288). I concur with Harley and Mattson who believe that, “what teachers need is not impersonal policy directives implemented from above with overtones of authority and control, but localised, contextualised, even personalised, developmental support and assistance in the everyday business of teaching”(2002, p.300). In line with this argument, I propose a discussion to trace the context of teacher education in apartheid and post apartheid South Africa.

1.2.2 The context of teacher education in South Africa

Most currently serving educators “received their professional education when education was an integral part of the apartheid system, and organised along racially and ethnically divided subsystems” (DoE, 2006, p.6). Since 1994, the teaching force had to endure numerous challenges, such as the rationalisation of the teaching community into a single system. The

introduction of new curricula, which emphasized greater professional autonomy, also required that teachers have knowledge and competences to cope with radical changes in the demographic, cultural and linguistic composition of their classrooms (DoE, 2006).

The Report of the Ministerial Committee on Rural Education, (2005) highlights specific challenges that face teachers in rural schools. These challenges include a shortage of qualified staff, under-resourced school facilities and limited access to professional development programmes for teachers. Policy initiatives such as the National Policy Framework for teacher education and development in South Africa have been introduced as an overall strategy for the successful recruitment, retention, and professional development of teachers, to meet the social and economic needs of the country. The objective of the policy is to achieve a community of competent teachers dedicated to provide high quality education. However despite this enabling policy, many teachers are still in the same predicament prior to the inception of this policy. Most teachers are functioning in and maintaining the status quo reminiscent of the apartheid era. They work in extremely complex conditions, largely due to pervasive legacies of apartheid, but also as a result of the new policies needed to bring about education change. Molo, (2007, p.468) argues that “ In the context of South Africa achieving the status of a learning organisation is difficult and complex given the nature of the different experiences of school leaders and teachers”. Jansen lends support to the above view when he argues that “these experiences are mediated by the way teachers understand and act on their value commitments, personal backgrounds and professional interests in the context of change” (2002, p.121). However, I believe that if schools are to transform into learning organisations, then the status quo cannot remain unchallenged. I argue that challenging the status quo requires a re-conceptualisation of education leadership and management in South Africa.

1.2.3 A re-conceptualisation of educational leadership and management

Under the new dispensation, many South Africa schools face daunting challenges with regard to their leadership and management structures, processes and relationships. The function of education has become too complex for one individual to oversee (Rutherford, 2006 cited in Khumalo , 2007). Presently in the US and the UK, leadership is emerging as a set of “functions rather than a formal role” (Lieberman, 1992, p.163 cited in Katzenmeyer and Moller 2001, p.2). I believe that the above view of leadership emphasizes expertise as opposed to authority, and can help to pave the way forward for transforming South African

schools into learning organizations. At a policy level, the traditional view of leadership being linked to headship, position, status and authority is being revised. More recent conceptions of educational leadership demonstrate a move away from the traditional authoritarian models of decision making towards more collegial relations between principal and their staff, (Steyn , 2000, p.267). Leadership and management are envisaged as group activities rather than the sole enterprise of the principal (Steyn and Squelch, 1997). I believe that the covert recommendation emerging from the Task Team Report on Education Management Development (1996) is that bureaucratic models should be replaced by collegial models of school organization. Unlike the bureaucratic models where power is monopolized by the principal, in collegial models, power is shared amongst all members in the organization and decision-making is through a process of consensus (Bush, 1995). Based on evidence emanating from empirical research conducted in the US and the UK, I argue that a key lesson for South African policy makers is that if South African schools are to transform into learning organizations then leadership needs to be co-located closer to the classrooms.

Policy documents such as *The South African Schools Act (1996)* and *The Norms and Standards for Educators (2000)* are challenging the authoritarian stereotypic view of leadership associated with headship. The ideology resonating in these policy documents is that innovation, change and development are no longer defined by those external to the school. A new professionalism seems to be emerging that places teachers at the epicentre of change (Katenzmeyer and Moller , 2001). These policy documents paved the way for post level one educators (educators who have no formal leadership or management position or title within the school organization) to take on leadership, management and administrative duties at school. Such a re-conceptualisation of school leadership and management requires that post-level one educators' assume roles and responsibilities that were previously reserved for the formal management personnel. In other words, the concept of teacher leadership and distributed leadership are implicit in current South African education policy documents (Grant, 2006). Harley and Mattson state that "the increasing significance of teacher empowerment coincides with the current changes taking place in education in South Africa" (2002, p.291). Their argument lends support to the concept of teacher leadership.

The South African School Act (1996) encourages participatory decision making and it provides an avenue for teachers to assume leadership positions in the school with regard to school governance and at a whole school level. Such leadership roles can manifest themselves

in the form of teachers as representatives on school governing bodies, school disciplinary and religious committees as well as language policy committees, to name a few. *The Norms and Standards for Educators (2000)* envisages the educator performing seven roles, amongst them that of a leader, manager and administrator. Implicit in these policy documents are the underlying assumptions that teachers should be working collaboratively with all stakeholders as well taking up leadership roles in their schools and beyond the school boundary into neighbouring schools. However despite this enabling legislation, many teachers in South African schools are not taking up leadership roles. I believe that this could be due to teacher ignorance of policy advocacy, or maybe because opportunities to lead have been restricted by bureaucratic structures and autocratic principals. I argue that accountability often reinforces bureaucracy and principals who feel legally accountable for the school organization become trapped in a web of bureaucracy and too often the vision of the liberating policy documents becomes blurred.

Against this background, it is my intention in this study to examine the extent to which post level one educators take up leadership and management roles in the case study school as outlined in the policy documents. Teacher leadership can be a strong catalyst for change. Therefore, the re- conceptualization of teachers as leaders needs firstly to be accepted and then given maximum exposure at all levels of the education system. This small-scale research study is an attempt to draw awareness to the concept of teacher leadership and its obvious benefits for school improvement. Based on this premise the current study intends to understand how teacher leadership is enacted in schools.

1.3 RESEARCH RATIONALE

My interest in teacher leadership stems from my own experience when I was a post level one educator as well as my experiences as a Masters of Education (MED) student at the University of KwaZulu-Natal (KZN). When I was a post level one educator, I had many opportunities to lead school-based initiatives. I took on roles and responsibilities previously designated to formal management personnel. When I reflect on my journey as a teacher leader at the school in which I teach, I became conscientiously aware of the trials and tribulations I experienced as a teacher leader in my school context. This motivated me to embark on another journey, this time as a researcher, tracking three teacher leaders in my own school context. I wanted to understand and describe their experiences as teacher leaders.

Secondly as a student engaged in the Teacher Leadership course in the Master of Education programme, I realized that extensive research on teacher leadership had been done in the USA (see for example Lieberman, Saxl and Miles, 1988 ; Wasley,1991; Little, 1995; Ash and Persall, 2000; Katzenmeyer and Moller, 2001; Lieberman and Miller, 2004),and more recently in the UK context (see for example Muijs and Harris, 2003; Harris and Lambert, 2003; Gunter, 2005 and Spillane, 2006). However, in the South African context, teacher leadership is a new and under-researched field and a gap exists in the South African literature with regard to teacher leadership and distributed leadership theory. The few studies that have been done include small qualitative case studies (see Grant 2005, 2006; Singh 2007; Rajagopaul 2007 ; Grant 2008 and Ntuzela 2008) as well as quantitative surveys (see Khumalo 2008; Grant, Gardner, Kajee, Moodley and Samaroo, 2008). These studies have a narrow and limited scope of teacher leadership. They are largely based on perceptions and description of teacher leaders. The purpose of my research was to transcend this boundary and get a nuanced view of teacher leadership. I, in the context of a case study school, aimed to raise questions about what teacher leaders believe, know and do. Furthermore, I wanted to explore the factors that teacher leaders, in my school context, perceived to be enhancing or hindering their role as leaders in the school. Policy documents such as *the South African Schools Act (1996)* and the *Norms and Standards for Educators (2000)* advocate teacher leadership practices. Yet very little research has been done to determine whether teachers in South African schools have taken up leadership roles. Therefore, this study was a small-scale attempt to explore the fit between policy and practice and it examined the factors that promoted or hindered the translation of these policies into practice.

The rationale behind conducting the research in my own school was firstly that it was convenient considering the nuanced approach that I was adopting in my research. Secondly, being in a management position, I wanted my research to give me feedback on how teacher leadership was being enacted in my school as well as to gain deeper insight into the factors that were promoting and hindering teacher leadership in my school context. It is my sincere hope that the findings of this research will be used to guide and elevate our school to a level where teacher leadership can be optimized.

1.4 THE CONCEPTUALISATION OF THE GROUP PROJECT

The Education Leadership, Management and Policy (ELMP) Master of Education students of 2008 consisted of a dynamic group of 11 individuals. Amongst us there were three principals, two deputy principals, two heads of department, one Further Education and Training (FET) college lecturer, a department district official, as well as two post level one educators. With regard to demographics there were two Indian students, three Coloured students and six African students. As MED, (ELMP) students we wanted to transcend the existing boundaries of qualitative research. We wanted to make a collective difference to qualitative research on teacher leadership. This was how the idea of the group project came about. We all shared a common interest for teacher leadership development in South Africa. Our topic arose out of the teacher leadership module we were studying at that time. The research questions were developed following extensive reading of other South African literature on teacher leadership. The existing South African research literature exposed a gap in the field, in that no large scale qualitative research on teacher leadership had been conducted before. As a group we wanted to plug this gap. The group project was led by the MED (ELMP) research lecturer. She supervised and coordinated the entire group project.

Amongst the 11 of us, we had access to seven different schools and one FET College. Each member of the group tracked and analysed three teacher leaders in different educational contexts across KwaZulu -Natal. In total 30 teacher leaders and three lecturer leaders were tracked. To gain a rich and in-depth view of teacher leadership, we used a variety of research instruments. Through the collaborative effort of the group we were able to design eight data collection instruments. The project was designed as a collective case study research. As a group our aim was to gain a nuanced view of the enactment of teacher leadership, and the factors that enhanced and hindered that enactment. The adoption of a collective case study approach was therefore apt. A limitation of our individual case study approach was that we could not make any generalisations with regard to teacher leadership and its enactment based on the findings from one case study. Based on the premise that teacher leadership is largely an organisational phenomenon (Smylie, 1995) we as a group wanted to find common trends in our research contexts, so as to establish some generalisation about the enactment of teacher leadership in various school contexts throughout KwaZulu-Natal. I argue any generalisations emerging from the group project, following the culmination of the individual studies, can be considered reliable and trustworthy.

1.5 RESEARCH AIM AND QUESTIONS

The aim of the study was to examine what leadership roles post level one educators took up in their school context and to make a comparative analysis between the leadership roles enacted by teacher leaders against Grant's (2008) zones and roles model of teacher leadership. Were these leadership roles delegated or emergent? The study also aimed to explore the factors that enhanced and hindered the take-up of leadership roles by post level one educators. This study further attempted to examine the relationship between the general leadership practices in the case study school and the enactment of teacher by the three teacher leaders.

The two main questions that guided the research study were:

1. How is teacher leadership enacted in a semi urban secondary school?
2. What factors enhance or hinder this 'enactment'?

1.6 RESEARCH DESIGN AND METHODOLOGY

Considering the aim of my study, I chose to locate my study within the interpretive paradigm. Working from the premise that teacher leadership is largely an organizational phenomenon (Smylie, 1995) I, wanted to describe and understand how the school context and the teachers' everyday life experiences within this context influenced their enactment of teacher leadership. In other words, I needed to take into account the participants' reasons for their actions as well as the social context of the action. For the interpretive researcher, social reality is based on a person's definition of a situation and is a product of the individual's consciousness (Neuman, 2000). The focus of the study was on understanding complex interrelationships rather than on explanation and control. Therefore, I argue that that the interpretive paradigm was the most appropriate paradigm to use.

The research methodology used to answer the research questions was in the form of a case study. Case study research is time and context bound (Yin, 1984). The prime referent is the 'case' which is the 'bounded reality'. In this study the 'case' was my school and the 'unit of analysis' was the three teacher leaders. Taking into account that I was conducting the study in my own school context, I had to employ a strategy to reduce the high risk of subjectivity. This strategy presented itself in the form of the case study approach. The case study methodology allowed me to use multi-method data collection techniques, which I believed, helped to reduce the element of subjectivity. Secondly, the multi-method approach offered by the case study methodology allowed me to get a complete and rich description of teacher leadership in action. I used quantitative methods (objective data) such as survey questionnaires as well as

qualitative methods (subjective data) such as semi- structured interviews, self-reflective journals, observations and document analysis to describe the phenomenon of teacher leadership. Stakes (2005) argues that the case study is guided by a conceptual structure. In the next part of this chapter, I give a brief outline of the conceptual structure guiding the study.

1.7 THE THEORETICAL FRAMEWORK

According to Babbie and Mouton (1998, p.111), “conceptualisation is the process through which we specify what we will mean when we use particular terms”. The theoretical framework that guided this study was the distributed leadership theory as proposed by Spillane (2006) and Gunter (2005). In addition, I use Grant’s (2008) zones and roles model of teacher leadership. For Spillane (2006, p.26) distributed leadership practice is constructed in the interactions between leaders, followers and their situation. A useful characterization of distributed leadership is offered by Gunter (2005), namely “authorized, dispersed and democratic” distributed leadership. This characterisation provided a useful framework for describing and analyzing the type of distributed leadership that prevailed in my school. Grant’s (2008) zones and roles model of teacher leadership suggests that teachers lead in four semi-distinct zones. In zone one teacher leadership exists in the classroom. In zone two teachers lead as they work with other teachers in their schools. In zone three, teacher leadership exists at a whole school level. In zone four teacher leadership, moves beyond the school land into the neighbouring schools. Using the six teacher leadership roles identified by Devaney (1987, cited in Gehrke, 1991) Grant (2008) extends her model of teacher leadership to include the four zones and the six roles of teacher leadership. My study utilised Spillane’s (2006) and Gunter’s (2005) characterisation of distributed leadership, as well as Grant’s (2008) zones and roles model as lenses to analyse and interpret the data. It is not my intention in this section to review all the key ideas and theories that underline my study. I have opted to elaborate and review most of the concepts guiding my study in *Chapter Two*, the literature review.

1.8 OUTLINE OF THE CHAPTERS

In this chapter, I discussed the background to my study and located the study in the realm of a South African education system in transition. I linked my study to the notions of teacher leadership and distributed leadership theory, as envisaged in the South African policy documents. Furthermore, I outlined the rationale behind the individual study as well as the

group project. Using the research questions as a foundation, I argued that the aim of the research was to examine how teacher leadership was enacted in schools and to explore the factors that enhanced or hindered this enactment. In the next chapter, *Chapter Two*, I discuss the theoretical framework of distributed leadership and the literature on teacher leadership that informed my study. I review both local and international literature on leadership theories, distributed leadership theory and teacher leadership. In *Chapter Three*, I discuss the research design and case study methodology used in this study. I also highlight the ethical issues and limitations pertaining to the study. *Chapter Four* attempts to present a descriptive analysis of the three teacher leaders as well as the major themes that emerge from the analysis of data. I use Gunter's (2005) characterizations of distributed leadership and Grant's (2008) zones and roles model of teacher leadership as tools in the analysis process. This dissertation concludes with *Chapter Five*, in which I present a summary of the major findings of the study. I propose a few recommendations and make suggestions for further research.

Implicit within the framework of distributed leadership theory, are the leadership practices of teacher. Therefore, in the next chapter, I present an intensive review of both local and international literature on distributed leadership theory as well as teacher leadership.

CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

In this chapter, I review relevant literature on leadership theories, distributed leadership theory and teacher leadership. I begin the chapter by examining the changing context of education leadership in South African schools and highlight how leadership is being redefined to encompass notions of distributed leadership and devolved leadership practices. Drawing on support from both international and local literature, I attempt to put forward an argument that distributed leadership theory resonates with the contemporary view that school improvement is unlikely to be achieved by traditional authoritarian leadership approaches. Evidence from empirical research studies on distributed leadership and teacher leadership points to a “re-conceptualisation of leadership practice that is fundamentally concerned with building relationships and harnessing the capacity of those within the school to create conditions for sustained school improvement” (Harris 2003, p.22). Within this interpretation, I critically examine both international and local perspectives of distributed leadership theory. I attempt to reveal the potential benefits of distributed leadership practice but at the same time, I expose its limitations particularly for the South African educational context.

The remainder of the chapter focuses on teacher leadership. Drawing from an array of both international and local literature, I review the concept of teacher leadership. In this study, I have adopted the view that the title of teacher leadership should be afforded to post level one educator only. Post level one educators in South African schools do not hold any formal management positions within the school management structures. Using a thematic approach, I examine theoretical perspectives on teacher leadership. I argue that for teacher leadership to flourish certain prerequisites have to be forthcoming. This would include a school culture that is collegial and collaborative with horizontal school structures and purposive action from the head. I examine the various roles that teacher leaders engage in and expose the potential benefits of this enactment. The chapter concludes with an in depth exploration of the factors that enhance and hinder the enactment of teacher leadership, particularly in South African schools.

2.2. THE CHANGING CONTEXT OF EDUCATIONAL LEADERSHIP

Prior to 1994, government policies promoted centralized, authoritarian control of education at all levels within education system (Grant, 2006). The view of leadership as headship dominated in South African schools. This view is captured in Bush's formal model of management "where heads possess authority legitimized by formal positions within an organization" (Bush 1995, p.52). According to Katzenmeyer and Moller (2001, p.3) "schools were bureaucratic organisations reflecting vestiges of Frederick Taylor's Scientific management system in which hierarchical control separated school managers (principals) from workers (teachers)". During the apartheid era, "transactional managerial leadership styles were encouraged by government initiatives that stressed accountability and performativity" (Coleman, 2005, p.20). This system of education promoted segregation, social injustices and an unquestioning respect for authority amongst teachers.

This highly regulated system also promoted order as opposed to engagement. Working conditions in these circumstances inculcated 'a-tell-me-what-to-do-mentality' amongst teachers (Wasley, 1991). Many teachers therefore viewed themselves as powerless and mere implementers of a predetermined curriculum. Teachers were not encouraged to participate in whole school development issues. This was largely the responsibility and domain of the formal management in the school. This, I believe, resulted in the 'inferiority complex' that many post-level one educators still experience today. Leadership was premised on individual endeavours rather than collective action (Day, 1999).

When the ANC government took control in 1994, its' major task was to develop fundamental transformational policies for its social institutions in order to address past inequalities of the apartheid system. The South African education system was to be "restructured towards a new direction and vision in line with the new constitution" (McLennan and Thurlow, 2003, p.1). Democracy and decentralization of power were firmly entrenched in many education policies. This paved a way for an alternative theory to transactional leadership namely transformational leadership theory. Leaders acting within the transformational leadership mode try to use power with or through other people, rather than exerting control over them (Coleman, 2005). Implicit in this theory is the notion of "shared or devolved leadership activity where leadership is not the preserve of the principal" (Harris, 2003, p.17). Therefore, I, argue that transformational leadership theory lays the foundation for distributed leadership theory. I am of the view that distributed leadership and teacher leadership are linked.

Later in this chapter, I present an argument that links teacher leadership, which I believe is a derivative of the distributive leadership theory, with transformational leadership. I argue that when teachers enact teacher leadership roles they display many transformational leadership skills. In contrast to transactional leadership theory, transformational leadership theory entails a change in the leader- follower relationship for the mutual benefit and improvement of the organization (Leithwood, 1992). Education policies, post 1994, seemed to revise orthodox thinking of leadership and its close association with headship. *The South African Schools Act (1996)*, the *Norms and Standards for Educators (2000)* as well as the *Task Team Report on Education Management Development (1996)* challenge schools to review their management practices. The aim of policy documents such as these encourage schools to be transformed into self- managed institutions with inclusive management structures. *The Task Team Report on Education Management Development* advocates a radical culture shift from a dependency culture to one of empowerment. Management is seen as “an activity in which all members of the educational organization engage and should not be seen as a task of few” (DoE, 1996, p.27). However, I of the view that despite the implicit merits of the above vision, it seems to emphasise management processes at the expense of leadership. I argue that leadership and management are not synonymous terms. The duties and responsibilities associated with leadership require very different responses from those associated with management. In the next paragraph, I attempt a brief discussion of these two concepts to illuminate these differences more clearly.

2.3 DEFINING LEADERSHIP AND MANAGEMENT

Cuban (1988) argues that whilst leadership is linked with change, management is seen as a maintenance activity. West-Burham (1992) has distinguished between leadership as being concerned with values, vision and mission and management as being concerned with execution, planning, organizing and deploying. Similarly, Louise and Miles (1990 cited in Thurlow, 2003, p. 26) argues that “leadership relates to mission, direction and inspiration. Management involves designing, carrying out functions and plans and getting things done.” Another view is that “contemporary leaders are effective agents of change” (Harris, 2003, p.13). Leadership is about getting things to change through inspiring and motivating the human resource (teachers) in the organisation. Management is about getting systems to operate effectively (Clark, 2007). Leadership is linked with vision, movement and change in an organization whilst management is a process, which works towards the stability,

preservation and maintenance of an organisation (Astin and Astin, 2000). A more comprehensive view of leadership and management has been proposed by Hooper and Potter (2000). These authors argue that leaders innovate, inspire trust and have a long-range view of organizational goals. Leaders focus on people, the human resources and are capable of challenging the status quo. Managers on the other hand administer systems and have a short-term view of organizational goals. They accept the status quo and obey orders without questions. Leaders create the school culture whilst managers operate within the culture. I agree with the above writers but I also believe that unlike management, leadership has an element of 'influence' to it. Leadership is about influence. More recently, this influence has also stemmed from teachers, primarily through their personal power, which could be attributed to their years of experience as well as their expert knowledge in relevant educational issues.

Stemming from the above discussion it becomes evident that leadership and management are two separate entities. However, like Kotter (1990) I argue that both leadership and management are needed if schools are to be transformed into the democratic learning organisations as envisaged by the policy documents. These policy documents advocate that all stakeholders should be involved in school leadership. As Lambert so persuasively writes:

Everyone has the potential to and the right to work as a leader. Leading is a skill and complicated work that every member in the school community can learn. Democracy clearly defines the rights of individuals to actively participate in the decision that affect their lives (1998, p.9).

I believe implicit in this quotation lies the notion of teacher leadership. However, in the South African context "despite an enabling democratic policy framework, the leadership of many schools remain firmly within the formal management structures and the potential for teacher leadership as envisaged by the policy documents remains untapped" (Grant and Singh 2008, p.1). Through my research study I intend to examine in the context of my own school if the above perceived scenario exists and if so why?

One of the most congruent findings from recent studies of effective leadership and school improvement is that authority to lead need not be located in the person of the leader, but can

be dispersed within the school organisation, (see for example Harris, 2002; Harris and Lambert, 2003). Similarly, Gunter adopts a critical perspective on leadership and argues that:

Education leadership is concerned with productive social and socializing relationships where the approach is not so much about controlling relationships, through team processes but more about how the agent is connected with others in their own and others learning. Hence it is inclusive of all and integrated with teaching and learning (2005, p.6).

I believe that this inclusive approach to leadership lies within the broad framework of distributed leadership theory.

2.4 DISTRIBUTED LEADERSHIP THEORY

2.4.1 Defining Distributed Leadership

I have located my study within the distributed leadership theoretical framework. The idea of distributed leadership is growing in popularity. Harris and Spillane (2008) in the international USA context critique the growing popularity of distributed leadership. They argue that distributed leadership is concerned with leadership practice rather than a role. According to Spillane (2006, p.13) distributed leadership acknowledges multi-leaders which he refers to as the “leader plus aspect”. Spillane (2006, p.3) further argues that “a distributed practice is a product of the joint interaction of school leaders, followers and aspects of their situation” Each of these three elements is essential for leadership practice. The situation defines the leadership practice. In other words, ‘leader and follower interactions’ will be different in different situations.

According to Harris and Spillane (2008, p.31) “distributed leadership has gained popularity because it possesses normative, representational and empirical power”. Through its empirical power, distributed leadership offers me a framework for analysing leadership. Spillane asserts that, “It can be used as a frame to help researchers decide what to look for when they investigate leadership” (2006, p.10). It is largely due to its empirical power that I have chosen distributed leadership as my theoretical framework. Distributed leadership is surrounded with conceptual confusion. Spillane (2006) argues that allied concepts such as democratic, participative and collaborative leadership have obscured the meaning of distributed

leadership. He argues that a “distributive perspective on leadership is a relative and not a replica of the above constructs” (2006, p.23).

As early as 1954, Gibbs (cited in Gronn, 2000, p.324) claims that, “leadership is best conceived as a group activity”. Expanding on Gibb’s ideas, Gronn (2000), in the US context takes a theoretical look at distributed leadership. He critiques the current state of leadership and argues for the retention of leadership but in a form which is in sync with the realities of the flow of influence in an organization. Leadership should be disentangled from its’ connection with headship. For Gronn “leadership activities need to be redefined to encompass pluralities of agents who’s actions express new patterns of interdependency” (2000, p.325). In other words, leadership is less about dependency and more about interdependency. This, I believe, is in keeping with the sentiments expressed in the education policies formulated under the democratic dispensation post 1994 in South Africa. It also signals a move towards professional learning communities, in which learning and capacity building amongst educators happens through interdependent social interactions. Similarly, Spillane (2006) writes that in its theoretical sense distributed leadership implies a social distribution of leadership through the interaction of multiple leaders. The concept of professional learning communities is discussed in detail later on in this chapter.

Gronn (2000) also suggests that the orthodox ‘leader-follower dualism’ be replaced by distributed leadership. He further argues that distributed leadership is a “group activity where influence is distributed throughout the organization and where leadership is seen as fluid and emergent rather than a fixed phenomenon” (2000, p .324). Similarly, Bennett, Harvey, Wise and Woods (2003, p.3) claim that distributed leadership is not something “done by an individual to others, rather it is an emergent property of a group or network of individuals in which group members pool their expertise”. Likewise, Harris and Muijs (2005, p.28) claim that “distributed leadership concentrates on engaging expertise where it exists in an organization rather than seeking this only through formal positions or roles.” However Harris and Spillane (2008, p.32) argue that “school improvement depends on the nature and quality of distributed leadership practice”, which I believe is largely dependent on the nature and quality of the internal management. Therefore, I argue that the presence of distributed leadership does not automatically guarantee school improvement. Effective distributed leadership practice requires that formal management personnel devolve power rather than just delegate tasks. As a result, leadership is seen as fluid, blurring the distinction between leader

and follower (Bennet *et al*, 2003).

If distributed leadership is indeed an emergent property as the above discussion implies, then I would argue that the structure and the culture of the school play a pivotal role in the emergence of distributed leadership practices. In other words distributed leadership practices emerge from collegial and collaborative school cultures. Bush (1995, p.52) refers to this type of culture as a ‘collegial model’ which “includes all the theories that emphasis that power and decision making should be shared amongst some or all members of the organization”.

I argue that this in itself can be very problematic for most schools in South Africa, in which the school and teaching cultures can be described as either fragmented individualism, balkanization or contrived collegiality (Rosenholtz, 1989). Fragmented individualism sees teachers working in isolation without any support or feedback. In balkanization cultures, teachers work in separate groups. Each group has it own outlook on teaching styles, discipline and curriculum issues. Contrived collegiality is a teaching culture in which teachers are forced to collaborate with each other (Hargreaves, 1992). These cultures, largely inherited from the apartheid era, emphasize isolation and competitiveness amongst educators rather than mutual trust and sharing. In addition to this, conflicting policy directives under the new dispensation have also stifled the emergence of distributed leadership practices. On one hand, there are policies that support standardization, accountability and assessment. On the other hand, there are policies and legislations such as the *South African Schools Act (1996)* and the *Norms and Standards for Educators (2000)* that support capacity building and enabling good practice. In theory, these policies enable schools to build the capacity of educators to engage in transforming their school into professional learning communities. These contradictory policies directives, I argue, have also contributed to a culture of distrust, non -sharing and disempowerment that prevail in many schools today. In the next part of this chapter, I focus on distributed leadership as a framework for analyzing my data.

2.4.2 Characterisation of Distributed Leadership

A useful characterization of distributed leadership is offered by Gunter (2005), namely authorized, dispersed and democratic distributed leadership. These characterisations, provide a useful framework for describing and analyzing the type of distributed leadership practices that prevailed in the case study school. For Gunter (2005), authorized distributed leadership operates within a hierarchical organization where the head distributes work to others. It is a

form of delegated leadership. Teachers accept the tasks for their own personal empowerment or for the functionality of the school. This type of work is generally regarded as legitimate as it is delegated by someone in authority and because it gives status to the person who takes on the work. Dispersed distributed leadership is more autonomous, bottom up and emergent (Gunter, 2005, p.52). This type of leadership acknowledges skills and expertise of others in an organization. Gunter (2005, p.54) writes that “while formal structures exist with role incumbents and job description, the reality of practice means that people may work together in ways that work best”. Similarly, Gronn (2003) acknowledges that this type of distributed leadership centres on spontaneity and intuitive working relationships. Through sharing the leadership tasks more widely throughout the organization and redefining roles, power relations in school shift away from formal leaders.

Democratic distributed leadership is similar to dispersed distributed leadership. Both have an emergent character where initiatives circulate widely (Woods, 2004). However, democratic distributed leadership goes further and raises issues about inclusion and exclusion. Unlike dispersed distributed leadership, democratic distributed leadership does not assume political neutrality but instead engages critically with organizational values and goals. It incorporates a social justice element to it. Unlike dispersed distributed leadership that accepts the status quo in schools, democratic distributed leadership challenges the status quo by challenging inequities and inequalities that may exist in the school (Woods, 2004). I, argue that the most authentic form of teacher leadership can be found in the democratic form of distributed leadership. My argument is based on Katzenmeyer and Moller’s (2001) call for schools to become professional learning communities where democratic and participatory decision-making exists. Augmenting Katzenmeyer and Moller’s (2001) interpretation of ‘professional learning communities’, Day and Harris (2002, p.962) argue that a:

professional learning community, is one where teachers participate in decision-making, have a shared sense of purpose, engage in collaborative work and accept joint responsibility for the outcomes of their work. Collaboration represents a horizontal rather than hierarchical power distribution within the school and is at the heart of teacher leadership.

Closely aligned to the concept of ‘professional learning communities’ is the concept of ‘communities of practice’ put forward by Wenger (1998). He argues that:

These communities of practice are characterized by learning as a social participation through mutual engagement and the negotiation of meaning where participation is a process of being active participants in the practices of social communities and constructing identities in relation to these communities (Wenger, 1998, p .4).

Both the professional learning communities and the ‘communities of practice’ operate within a culture of collaboration and participation and pave the way for the development of authentic teacher leadership.

2.4.3. Criticisms of Distributed Leadership Theory

Whilst there are obvious benefits of distributive leadership theory, I also acknowledge that there are limitations to the theory. Gunter (2005, p.5) interrogates the distributed leadership practice and questions what exactly is distributed, are only technical tasks distributed or are responsibility, authority and legitimacy also distributed? She also examines the location and exercise of power in the organisation. If indeed responsibility, authority and legitimacy are distributed, then for me this signals the existence of a paradoxical relationship. The more authentic distributed leadership becomes the more it raises the issue of accountability. Who is going to be accountable if things go wrong and tasks are not completed successfully? This I believe is one of the weaknesses of the distributed leadership theory. It fails to acknowledge and resolve the issue of accountability within the school organization. Most education policies reinforce the idea that accountability for the operations in the organization ultimately rests with the principal. Therefore, it might be safe to assume that this is the reason why many principals are reluctant to distribute power and authority, throughout the organization. Those few principals that do have the courage to distribute power and authority do so selectively and within limits. Furthermore, how does distributive leadership theory deal with the issue of incentives? Should incentives be given to post level one educators who, in addition to their normal workload, take on leadership roles based on their expertise? Some critics may argue that the experience gained on the job is, in itself, an incentive and it will hold the incumbent in good stead for future management positions. A counter argument could be that these educators should be compensated for the additional time they spend carrying out these leadership duties. If no incentives are given, there is a possibility that the educator might not take on any leadership roles. I am of the view that incentives could be monetary or in the form

of a personal reprieve, such as a decrease in the educator's teaching load. The down side of the latter option is that it takes the expert teacher away from the one thing he or she does best, teaching. The above discussion is largely me speculating about possible arguments and counter arguments surrounding the issue of incentives. This is because one of the limitations of the distributed leadership theory is that it remains silent on how to deal with the issue of incentives. I would argue that because of this, schools that do engage in distributed leadership practices, must decide for themselves how best to deal with this issue of incentives.

How does distributed leadership theory address variations in educational contexts, especially when one considers the great disparity that exists between the western educational context, where the theory was formulated and our South African educational context? Even within our own South African context, is it possible that distributed leadership practices will work better in affluent schools as opposed to the so-called poorer schools? I raise this question based on the accepted perception that distributed leadership is premised on expertise and expert knowledge. South Africa is experiencing a shortage of qualified teachers. This view is supported by a survey conducted by Bertram, Muthukrishna, and Wedekind (2007) around the "supply and demand problem of teachers and teacher migration". It is a well-known fact within the teaching fraternity that, due to teacher shortages, expert teachers are head-hunted by affluent schools. These schools attract these expert teachers to their school with lucrative salary packages. Most of these teachers have good qualifications and years of experiences, which contribute to their expert knowledge. Considering Harris and Muijs's (2005, p.28) claim that "distributed leadership concentrates on engaging expertise where it exists in an organization rather than seeking this only through formal positions or roles," is it possible that the organizational structure of affluent schools create more opportunities for distributed leadership practices? What then becomes the fate of poorer school where many of the educators are under-qualified or unqualified? Do they have adequate expert knowledge to take on leadership roles and create opportunities for distributed leadership practices? Is it possible that the distributed leadership practices favour the affluent schools? I believe the irony of the situation is that the schools that need distributed forms of leadership for school improvement are those that are deprived of it. Unfortunately, schools in South Africa reflect the capitalistic society in which we live. The proverbial 'rich get richer and poor get poorer' scenario exists and in the context of distributed leadership practice, 'richness' can be metaphorically described as having access to educators with expert knowledge. The above discussion highlights some of the limitations of the distributed leadership theory. I acknowledge these

limitations and I intend to raise the issues of accountability, incentives and context variations in my own research, in order to strengthen and develop my theoretical framework.

2.5. TEACHER LEADERSHIP: A RESEARCH PERSPECTIVE

2.5.1 Introduction

“Distributed leadership is premised upon high levels of teacher involvement” (Harris, 2004, p.14). In other words, it offers a platform for teacher leadership to emerge. Teacher leadership is arguably one of the manifestations of distributed leadership (Gronn 2000, Woods *et al*, 2004). But what exactly is teacher leadership? What are the characteristics that epitomize teacher leadership? How is it enacted in our schools? Are there benefits of teacher leadership and if so, how can it be developed and enhanced? What are the possible barriers to teacher leadership, especially in our South African context? In the remainder of this chapter, I seek to explore the issues raised by these fundamental questions.

The concept of teacher leadership is relatively new in South Africa. Although there has been a proliferation of teacher leadership literature first in the USA, (see for example Lieberman, Saxl and Miles, 1988; Wasley, 1991; Little, 1995; Ash and Persall, 2000; Katzenmeyer and Moller, 2001; Lieberman and Miller, 2004) and more recently in the UK context (see for example Muijs and Harris, 2003; Gunter, 2005; and Pounder, 2006), most of the literature consists of position statements, essays, and status reports. A relatively small portion of literature on teacher leadership consists of systematic empirical investigation (Smylie, 1995). Most researchers examine only the surface of teacher leadership, failing to probe inside the roles and activities to understand the nature and function of teacher leadership (Smylie, 1995). In-depth, nuanced empirical investigations on teacher leadership are limited, and more so in our South African context. I argue that teacher leadership is a catalyst for the transformation of South African schools into learning organization, with well-developed professional communities. There is now an urgent need for much more empirical evidence of teacher leadership, if teacher leadership is to transcend from rhetoric into operational reality.

2.5.2 Defining Teacher leadership

Attempting to define teacher leadership is problematic. It is evident from international literature that there are overlapping and competing definitions of teacher leadership (Harris and Lambert, 2003). According to Harris and Lambert (2003, p.43) “teacher leaders are in the first place, expert teachers who spend majority of their time in the classroom but take on

leadership roles at times when development and innovation is needed”. Pounder (2006, p.534) argues that the “conceptualization of teacher leadership is grounded on professionalism and collegiality and is a label reserved for those teachers who improve a school’s educational climate by engaging colleagues in various activities designed to enhance the education process”. Similarly, Katzenmeyer and Moller’s (2001, p.17) define teacher leadership “as teachers who lead within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others toward improved educational practice”. Developing on Katzenmeyer and Moller (2001) definition, Grant (2008, p.4) argues that for a South African context teacher leadership can be understood as:

a form of leadership beyond headship or formal position. It refers to teachers becoming aware of and taking up informal and formal leadership roles both in the classroom and beyond. It includes teachers working collaboratively with all stakeholders towards a shared and dynamic vision of their school within a culture of fairness, inclusion, mutual respect and trust.

For the purpose of the study I align myself with the definitions of both Katzenmeyer and Moller (2001) and Grant (2008) because both definitions seem to imply that teacher leadership is a social practice, which I agree with and, through this chapter, I present an argument to support this view. Secondly both definitions contradict the widely held view that the only way to become a teacher leader is to leave the classroom and if possible the school, in order to learn leadership skills (Troen and Boles, 1994 and Barth, 1996). I strongly believe that teachers can learn leadership skills within the school context and hence my support for Katzenmeyer and Moller’s (2001) and Grant’s (2008) definitions of teacher leadership.

Building on the work of these two writers, I further argue that authentic teacher leaders are those who have no formal management positions conferred upon them by the DoE ,in other words these are the educators who hold a post level one status in schools and whose leadership tasks and roles are self – initiated and emergent. However, it is not my intention to minimise the value of delegated teacher leadership. Considering our South African education terrain, any form of teacher leadership outweighs its absence. To illustrate this point more clearly, I propose a continuum based on the degree of authenticity of teacher leadership, which ranges from delegated (left) to emergent (right). The authenticity of teacher leadership

increases as we move from left to the right of the continuum. Furthermore I believe that teacher leadership, like distributed leadership, is also fluid and emergent (Gronn, 2000). Therefore, the ways in which it is exhibited or enacted within schools will vary depending on the school's context.

2.5.3 Teacher leadership: an organisational phenomenon

Grant (2005) notes that teacher leadership must be understood in the context in which it operates. I support Grant's (2005) view and believe that in order to develop a deeper understanding of how teacher leadership is enacted I have to study the context in which it occurs. My argument is supported by Smylie (1995, p.6) when he says, "Teacher leadership is an organisational phenomenon. It is influenced by and exerts influence on the structural, political and cultural dimensions of a school organisation". If teacher leadership is viewed as a vehicle for change then we must acknowledge that organisations possess powerful conserving forces such as deep structures of symbols, routine norms and values that could complicate or contravene the functions and outcomes of teacher leadership. Evidence emanating from literature on teacher leadership, seems to support the view that it may be difficult to develop teacher leadership without developing its context first (Darling – Hammond, 1995; Griffin, 1995; Hart, 1995; and Little, 1995). This I believe will have major implications for how teacher leadership is enacted in South African schools, considering the diverse contextual backgrounds of our schools, created by the legacy of apartheid.

Considering these context variations, I argue that there can be no standardised checklist describing the roles that teacher leaders should engage in. My argument is supported by Lord and Miller (2000) when they write that teacher leadership roles evolve from the challenges that face teachers in that particular context. For example, there may be different teacher leadership opportunities in a high school as compared to a primary school. Similarly, Wasley (1991) writes that it is important to understand how the school context shapes the work, experiences, and roles of teacher leaders.

2.5.4 The Informal and Formal Roles of Teacher Leaders

Based on the above premise, I now explore a fundamental question, which is, what do teachers leaders do? In other words, how is teacher leadership enacted in a school organisation? I begin my discussion with a generic view of teacher leadership roles. I believe

that these generic roles evolve into contextualised teacher leadership roles, depending on the challenges that individual schools face.

As early as 1987, Devaney (cited in Little, 1995) identified six leadership roles that epitomized teacher leadership. The first role was described as, '*continuing to teaching and improving one's own teaching expertise*'. In this leadership role, expertise in subject matter knowledge was critical because it was basic to other leadership roles. The second leadership role that was identified was '*organizing and leading peer review of school practice*', which encompassed the ability of teacher leaders to examine school practices through action research methods. The third leadership role saw teacher leaders, '*providing curriculum development knowledge*'. Therefore, teacher leaders are curriculum leaders and master teachers. '*Participating at school level decision making*' was identified as the fourth leadership role teacher leaders engaged in. The fifth role describes teachers, '*leading in-service education*' and assisting other teachers. Descriptors in this role included, peer coaching and mentoring. The sixth leadership role was '*participating in the performance evaluation of teachers*' when teacher leaders review the performance of their peers. Drawing evidence from case study research, Wasley (1991) lends support to Devaney's (1987 cited in Little, 1995) descriptions of teacher leadership roles. Wasley (1991 p.5) concludes that some of the roles teacher leaders engage in are mentoring colleagues, problem solving at a school level and providing professional development activities for colleagues.

Grant (2006) builds on Devaney's (1987 cited in Little, 1995) work and offers a model of teacher leadership for the South African context, in which teacher leadership is categorized into four levels or zones. The first level (*zone one*) sees teachers being leaders in the classroom, leading the teaching and learning process. This view is reflected in much of the literature of teacher leadership, which emphasises that teacher leaders are expert teachers (Ash and Persall, 2000; Katzenmeyer and Moller, 2001). In addition, lending support to this view is Sherrill (1999) who argues that the core expectations of a teacher leader are exemplary classroom instruction and sound pedagogical knowledge.

The second level (*zone two*) views, teacher leaders, as leading beyond the classroom, developing working relationships with other teachers in an attempt to improve their classroom practice. This view of teacher leadership is closely linked to Hoyles, (1980) and Broadfoot *et al*, (1998) concept of "extended professionalism" which refers to teachers who understand

their work more broadly, continually reflecting on their work to change and improve it. Through formal and informal leadership roles such as providing curriculum development knowledge and participating in peer performance evaluation, teacher leaders assume a mentoring or ‘critical friendship role’ as they work with other teachers on issues of teaching and learning. This second level of teacher leaders is similar to Day and Harris’s (2002) fourth dimension of teacher leaders, where individual teachers forge close relationships with other teachers through which mutual learning takes place.

Level Three (*zone three*) is viewed as “Teachers becoming more involved with whole school development issues, such as vision building and policy development” (Grant, 2006, p.520). This level refers to teacher leadership in relation to extra-curricular activities, sport and school development projects e.g. fundraising development of school policies and staff development programmes. Similarly, Day and Harris (2002) reflect on teacher leadership as it focuses on participative leadership, where teacher leaders assist other teachers to cohere towards a collective goal. In other words, they work with colleagues to shape whole school improvements. This view also resonates with Katzenmeyer and Moller’s (2001) interpretation of a professional learning community of teacher leaders.

In Level 4, (*zone four*) teacher leaders are those that extend themselves beyond the school and lead in the community. Examples of teacher leadership that would illuminate this zone include teachers as cluster leaders networking with other teachers across schools in the community. Teachers holding leadership positions on school governing bodies as well as teacher assuming executive roles in teacher union bodies. Wasley (1991) supports this view of teacher leadership in research work, where reference is made to teachers teaming across schools as a critical dimension to teacher leadership.

2.5.5 Characteristics of Teacher Leaders

2.5.5.1 Essential Leadership skills

As early as 1988, Lieberman, Saxl and Miles in their study of 17 teacher leaders in the US context, concluded that for teacher leaders to work effectively they need a variety of skills. These skills include, trust and rapport building, organizational diagnosis and dealing with the change process. They also include, using resources, managing the work and building skills and confidence in others. Although these skills were derived from a study conducted in the US context, I believe that despite the ‘endemism’ of teacher leadership, there could be a

possibility that teacher leaders, irrespective of their context, display certain generic characteristic skills. These skills could also be applicable to teacher leaders in our South African context.

Therefore, in keeping with this view I believe a brief discussion on the above listed skills is warranted. Building trust and developing rapport with other teachers is an essential skill for teacher leaders because it allows them to earn legitimacy and credibility amongst their peers. Engaging in open supportive communication is a part of building trust and it can assist the teacher leader when dealing with resistance from other teachers. For teacher leaders the ability to build trust and rapport lays the foundation for the construction of collegial and productive working relationships amongst teachers. As Evans (1998 p.183) notes:

Trust is essential to support the leadership climate. It is the essential link between, leaders and led, vital to people's job, status functions and loyalty, and vital to fellowship. In this sense leadership is re-conceptualised as a set of behaviours and practices that are undertaken collectively.

Similarly, Grant (2006, p.523) argues that the virtue of trust is "important for the development of quality relationships which are fundamental to a collaborative culture and organisational change". The second cluster of skills, organizational diagnosis requires that the teacher leader have a good understanding of the school culture. I argue that this information helps the teacher leader to make a diagnosis of the school organization, to plan a strategy of action to get people in the organization working towards a common goal and vision. Teacher leaders need to be skilled in dealing with and managing the change process. They need to be able to solve problems collaboratively, mediate conflict and confrontational situations when dealing with the change process (Lieberman, Saxl and Miles, 1988).

The fourth cluster of skills involves the effective use of resources such as people, ideas material and equipment in the pursuit of collective goals. Building a resource network with other teachers in the community is critical to the work of teacher leaders. I am of the view that teacher leaders need to be able to manage their work effectively by managing their time, setting priorities for their work and coordinating the many facets of their work. The last cluster of skills involves the ability of teacher leaders to build skills and confidence in others. Teacher leaders need to have the ability to build a supportive network for the school

community that is sensitive to individual teachers but at the same time promote organizational change (Lieberman, Saxl and Miles, 1988).

Katzenmeyer and Moller (2001) identify three characteristics that teachers need to possess in order to claim readiness for teacher leadership roles. These include competency, credibility and being approachable. Teachers who are competent in the classroom earn credibility amongst their peers. However, the authors argue that being approachable seems to be the critical characteristic. I tend to agree with them, because within professional learning communities, teachers are learning in a social context and therefore the ability to build positive interpersonal relationships is fundamental to the sustainability of the professional learning community.

Like Cambone, Weiss and Wyeth (1992, cited in Katzenmeyer and Moller 2001), I believe that teacher leaders need to acknowledge diversity amongst their peers to successfully influence them. Certainly within our South African schools there is increasing ethnic diversity. Therefore, teacher leaders must have the ability to be tolerant and sensitive to other points of view. This is crucial to the success of teacher leadership roles. These skills are important for the efficiency of teacher leaders. Furthermore, schools are complex organisation and change is unavoidable. Policy changes, which are a frequent occurrence in South African schools leads to restructuring and re-culturing of the school context. As a result of this, teacher leaders need to modify and adapt their leadership skills depending on the challenges that exist in that particular. Therefore, the school context will largely determine the appropriate leadership skills that teachers need to develop. In other words, teacher leadership skills will vary in different contexts. For me this signals a notion of teacher leadership as being a dynamic process and not a static position. My argument is supported by Pounder (2006) when he writes that teacher leadership should be conceived of as process rather than a positional concept because it comprises of an array of behaviours and characteristics rather than positional leadership roles. To me this view of teacher leaders tends to resonates with the theory of transformational leadership. Are they linked?

2.5.6 The link between transformational leadership and teacher leadership

In his editorial in the EMAL journal 'Global Perspectives on Education Leadership', Bush (2006) links Pounder's (2006) view of transformational classroom leadership practices with Grants' treatment of teacher leadership. Pounder (2006) notes that while many studies have

attempted to articulate the characteristics of teacher leadership; few studies have attempted to place the notion of teacher leadership within the framework of current leadership theories. Pounder (2006) seems to suggest a link between teacher leadership and transformational leadership qualities as outlined by Bass (1988 cited in Coleman, 2005). Bass's conceptualization of transformational leadership contains the characteristics of, *Idealised influence* or *charisma*, *Inspiration motivation*, *Individual consideration* and *Intellectual stimulation*. In his study on teacher leadership in a socially –disadvantaged school in the U.S, Crowther (1997) concludes that the behaviours of the teachers in the study had much in common with aspects of transformational leadership. He describes these teachers as having a deep commitment to a set of core values which they were prepared to communicate openly. This resonates with the idealised and inspirational motivation dimensions of transformational leadership. This notion of teacher leadership is significant in our context, since the ability to inspire can counteract the degree of apathy amongst teachers that exists in our schools.

Pounder's (2006) view offers support for Silva, Gimbert and Nolan's (2000) earlier finding of teacher leadership. Their description of teacher leaders as nurturers of relationships and models of professional development, echo aspects of the individual consideration dimension. They further describe teacher leaders as encouragers of change and challengers of the status quo. This reflects the spirit of the intellectual stimulation dimension as outlined by Pounder (2006, p.537). Similarly, teacher leadership studies by Darling - Hammond, (1995) document that teacher leadership behaviours centre around qualities such as the openness to new ways of doing things and the modeling of learning. This, I believe, reflects aspects of intellectual stimulation and individual consideration. However considering the limited number of empirical studies that link teacher leadership with transformational leadership, much of what is discussed above is rather speculative.

Like Pounder (2006), I believe that with the notion of teacher leadership, teaching and leading are inexorably linked. Therefore, I support Pounder's (2006) stance that more empirical studies that link teacher leadership with transformational leadership are required. I believe that my first research question 'How is teacher leadership enacted in school?' might shed some light on this issue and contribute to the empirical body of literature that connects teacher leadership and transformational leadership skills. I now focus on yet another important link to teacher leadership namely school improvement.

2.5.7 Teacher leadership and school improvement

Why is there a need for teacher leadership? What are the potential benefits of teacher leadership for the school as an organization? Day and Harris (2002), suggest that effective principalship is not the key constituent in achieving school improvement. Within the increasingly complex context of accountability, that characterises schools, many school principals are painfully recognising that they cannot lead and manage schools alone. Similarly Conley and Muncey (1999, cited in Katzenmeyer and Moller, 2001, p.2) write that “the enormous tasks of meeting the schools challenges requires that teachers assume roles and responsibilities that were previously reserved for school principals”. Bush (2003, p.70) writing in the South African context, uses case study and survey research evidence to make the claim that “South African schools are under –managed”. Many schools face shortages in their internal management structures. However to counteract the effects of these shortages, intuitive principals have created unofficial and unpaid formal and informal leadership and management roles which they have delegated to post level one educators, in order to manage schools effectively. In response to this delegated nature of teacher leadership, I reiterate my earlier argument that any type of teacher leadership is better than the absence of it. School principals need to realise that the survival of their schools’ effectiveness and improvement lies in the wake of teacher leadership. Therefore, I believe that teacher leadership is rapidly becoming a necessity in the leadership and management of South African schools.

Effective principals are those that encourage collaborative cultures and dispersed leadership across the organisation. Teacher leaders are architects of a professional learning community when they re-culture a school. Teacher leadership moves the leadership role from one individual to a community of professionals committed to improving student learning (Katzenmeyer and Moller, 2001). Barth (2001) posits that all teachers can lead. He argues that all teachers harbour leadership abilities. I tend to agree with this view and I contend that it is when teachers join this community of practice that their true leadership potential emerges because they begin to work with other teachers and lead. Little (1990) makes a claim about the contribution of strong collegial relationships between teachers to school improvement. Rosenholtz (1989) also calls for teacher collegiality and collaboration as a means of generating positive change in schools. I reiterate my earlier sentiments that collaboration is at the heart of teacher leadership as it represents a horizontal rather than hierarchical power distribution.

Day and Harris (2002) identify four dimensions of the teacher leadership role in relation to school improvement. Firstly they argue that, teacher leaders help translate the principles of school improvement into practices of individual classrooms. Their second dimension focuses on participative leadership; teacher leaders work with colleagues to shape school improvement efforts and they lead in guiding teachers towards a collective goal. The third dimension of teacher leadership in school improvement is the mediating role. Teacher leaders are important sources of expertise and information because “They are able to draw critically upon additional resources and expertise, if required and to seek external assistance” (Harris and Muijs, 2003, p.439). Therefore, teacher leaders are able to mediate the school improvement process. Finally and possibly the most important as discussed earlier in this chapter, is the forging of close relationships within individual teachers through which mutual learning takes place.

It is important to note however that schools that are failing tend to be characterised by an impoverishment in teaching and teacher development (Liebermann, 1996; Day, 1999). The potential for teacher leadership and its presences in large-scale reform suggests the importance of additional research in the field of teacher leadership. The clear message emanating from the above discussion is that school improvement is more likely to occur when teachers have a vested interest in leading school development (Gronn, 2000). I assert that this strong empirical link between teacher leadership and school improvement warrants a closer examination of the preconditions that need to be met for teacher leadership to operate effectively.

2.5.8 Pre-requisites of teacher leadership

2.5.8.1 Collegial and collaborative structures and cultural norms

Schools vary in the degree to which they support the leadership of teachers. Through their work with over 5000 teacher leaders, Katzenmeyer and Moller (2001, p.137) claim that, “Schools that support teacher leadership display certain identifiable characteristics, which the authors refer to as the dimensions of teacher leadership”. These characteristics include *development focus, recognition, autonomy and collegiality as well as participation, open communication and a positive environment*. In essence what this means is that those schools that support teacher leadership have teachers who are actively supported in developmental learning opportunities. The ideas and opinions of teachers are valued, respected and recognized. Teachers are encouraged to take initiative, to be innovative and collaborate on

instructional and student related matters. Furthermore, in these schools teachers are actively involved in decision -making at a whole school level and openly discuss issues and engage in problem solving. Finally, teachers are viewed as professionals and treated as such.

The implications stemming from the above discussion are, for teacher leadership to emerge in schools certain structural and cultural pre-requisites are necessary. This I believe would include a culture of collaboration with participatory decision-making and vision sharing operating within the realm of a distributed leadership practice. A core set of values, such transparency, trust, respect, consultation and ownership are fundamental to the development of distributed leadership practices, collaborative cultures and ultimately organizational change (Muijs and Harris, 2003). A culture of trust is seen as both a facilitator and a result of teacher leadership (Linguist and King, 1993; Caine and Caine, 2000; Little, 2000 cited in Muijs and Harris 2007). Grant (2005, p.523) identifies courage as the most common value innate in teacher leaders when she says that, “a true leader is one who has courage to take the initiative to make changes”. Similar sentiments are expressed by Wasley (1991, p.101) when she writes, “a teacher leader is a person who can think and be creative with solutions. A person who has the guts to follow his /her principles”. This is especially significant for post level one educators who are teacher leaders, since they lead and initiate change without holding any formal management position and this demands a great deal of courage. This again supports my argument that the title of ‘teacher leaders’ should be conferred to post level one educators only.

2.5.8.2 Leadership -‘dense’ organisations

Empirical evidence stemming from studies conducted by Grant (2005) and Harris and Muijs (2007), lends support to the view that strong and purposive leadership by the principal is crucial to the development of teacher leadership. Similarly, Ash and Persall (2000) write that the principal’s role as a chief learning officer is to build an organisational climate that encourages and supports leadership throughout the school. Principals who engage in real school change recognise that every teacher can be a leader within the organization and that each member in the organisation can play the role of teaching, learning and leading.

Lieberman and Miller (1999, p. 46 cited in Katzenmeyer and Moller, 2001, p.83) refer to these schools as being ‘leadership dense’. In the words of Spillane (2006), leadership needs to be ‘stretched’ throughout the organisation. This resonates with the notion of distributed leadership and furthermore it strengthens the earlier argument that distributed leadership is a

precondition for teacher leadership. Within the South African context, I argue that principals need to transform their school into ‘leadership dense’ organisations. I believe that principals who exhibit transformational leadership qualities such as inspiration, motivation, individual consideration and intellectual stimulation are able to successfully lead this transformation. These principals will be able to harness the untapped potential within teachers to lead.

The presence of the pre-requisites discussed above, would greatly influence the enactment of teacher leadership within schools. Muijs and Harris (2007), drawing on empirical evidence gathered from three case studies describing “teacher leadership in action” in three contrasting schools, provide a useful characterization of teacher leadership. They refer to *developed*, *emergent* and *restricted* teacher leadership. In the study, *developed* teacher leadership was characterised by a high level of teacher -led initiatives and decision making concerning all aspects of the school organization. This was accompanied by strong management support. In *emergent* teacher leadership most decisions- making initiatives resided with senior and middle management. Teachers were consulted on a wide range of issues such as school policies, curriculum development. However, teacher involvement in decision-making was limited (Muijs and Harris, 2007). Teachers not participating in any decision-making at a whole school level characterized *restricted* teacher leadership. Their involvement was limited to consultation on departmental issues only. The study also highlights factors that enhance or hinder teacher leadership development in schools.

Factors that seem to enhance teacher leadership in schools include structural changes such as the availability of time for teachers to meet and plan issues pertaining to whole school development (Muijs and Harris, 2007). Similarly, Lord and Miller (2000) write that teacher leaders need extra time to carry out their leadership work in addition to their teaching responsibilities. Having good interpersonal skills enhance teacher leadership, because teacher leaders are able to influence colleagues as well as develop productive relations with school management who may feel threatened by teachers taking up leadership roles (Liebermann, 1998; Clemson- Ingram and Fessler, 1997 cited in Muijs and Harris 2007). Schools culture that emphasis’s teamwork and collegiality promotes teacher leadership (Grant, 2006; Harris and Muijs, 2007). Lending support to the above view Bush (2003, p.70) describes that authority in collegial structures is based on professional expertise rather than position. Therefore, I believe that collegial structures and cultures create an environment in which

teacher leadership can flourish. Teacher leadership develops naturally amongst professionals who learn, share and address problems together.

2.5.8.3 Professional development opportunities: Leadership focused

Evidence emerging from empirical data seems to suggest that opportunities and support for continuous professional development is a prerequisite for enhancing teacher leadership (Muijs and Harris, 2007). Gerhke (1991) argues that these professional development initiatives should focus on aspects specific to leadership roles. Katzenmeyer and Moller, (2001) echo similar sentiments when they assert that skills such as leading groups, workshops, mentoring, and teaching adults need to be incorporated into professional development programmes to enhance teacher's confidence to lead.

Grant (2008, p.104) lends support to the above view when she contends that, "professional development initiatives for educators must be linked to issues of leading if the goal is to have sustained impact on the whole school context". I argue that if teacher leaders are not provided with professional development opportunities that focus on appropriate leadership skills, then most teacher leadership roles will be limited to the classroom. In other words the teacher leader will be leading in the zone of the classroom (zone one) only. Ash and Persall (2000) emphasise that professional development initiatives should not be imposed by external education bodies but should rather be site based and take cognizance of the goals of the school. Within our South African context, the *Employment of Educators Act (1996)* stipulates that teachers are expected to spend an additional 80 hours a year on professional development initiatives outside their normal school hours. However, a damning report by Linda Chisholm (1997) showed that in many schools this is not happening. She argues that few schools devote significant time or resources to the professional development of their staff. This hinders teacher leadership and the vision of the enabling policy framework remains rhetoric rather than being translated into reality.

With regard to the issue of training and support within our South African context, the common held view amongst policy makers is that expert teachers make expert teacher leaders. This has resulted to the introduction of the senior and master teacher profiles within the *Occupation Specific Dispensation Framework (2007)*. Policy-makers regard these senior and master teachers as expert teachers based on their expertise in curriculum knowledge. Therefore, policy dictates that within their job description as senior and master teachers they

are expected to engage in leadership roles such as curriculum development peer coaching and mentoring. I argue that whilst teacher leaders may be expert teachers as advocated by Ash and Persall (2000) the converse is debatable. Many curriculum expert teachers (master and senior teachers) lack leadership skills such as facilitating workshops, public presentation and negotiating skills. Lord and Miller (2000) supplement the above argument when they assert that training and support, focusing specifically on leadership skills, is a prerequisite, if highly skilled classroom teachers are to become effective teacher leaders. South African policy makers need to acknowledge that recruiting teachers to these leadership positions (master and senior teachers) is no guarantee that they will be able to lead change. In the next part of this chapter, I review teacher leadership literature that focuses on the barriers to teacher leadership development.

2.5.9 Barriers to teacher leadership

2.5.9.1 Hierarchical school organizations

One of the most power barriers to teacher leadership is a hierarchical school organization controlled by autocratic principals (Grant, 2006). Muijs and Harris (2007) reinforce this view when they note the inability of the principal to relinquish power to others in the organisation. This problem of ‘letting go’ is also reported by Singh (2007) who claims that in her study that school management team members who felt the sole weight of accountability for leadership of their schools, perceived teacher leadership to be risky. Contrary to this belief, I argue, that teacher leadership does not suggest that the role of the SMT and the principal becomes redundant. However, what it does suggest is that the SMT is critical in enabling teacher leadership and creating opportunities for teachers to lead. My argument is supported by Harris and Muijs (2005, p.28) when they say, “The task of the school management team is one of holding the pieces of the organisation together in a productive relationship.”

2.5.9.1 Stereotypic ‘leader-follower dualism’

Closely linked with autocratic principals as a barrier to teacher leadership is the assumption that only people in formal management positions should lead (Grant, 2006). This view concurs with literature which points towards top-down management structures in schools as a major impediment to teacher leadership (Muijs and Harris, 2003). This problem is further exacerbated by policy documents that emphasize the principals’ accountability. This unwillingness of teachers to take on leadership roles can be largely attributed to the defeatist attitudes inculcated in them during the apartheid system and the stereotypic ‘leader-follower

dualism' that persists. Recent literature based on a South African empirical study conducted in 40 schools in Gauteng by Grobler and Moloi (2008) seem to point to racial divisions engendered by the previous dispensation as a barrier to teacher leadership. They seem to suggest that this racial division has created superiority and inferiority mentalities amongst teachers, despite the legislation on equity. I tend to agree with them and I argue that cultural diversity needs to be managed effectively, if schools are to transform into professional learning communities in which teaching and leading is largely a social practice.

2.5.9.3 Egalitarian Ethos

Egalitarian factors seem to be another barrier to the development of teacher leadership. Research evidence shows that teacher leaders are intimidated by colleagues when taking up leadership roles (Muijs and Harris, 2007). For many teachers "taking on leadership roles is risky territory, where the rewards are few and rejection from their peers, an almost certainty" (Katzenmeyer and Moller, 2001, p.79). According to Lord and Miller (2000) in a USA context, the term 'teacher leadership' embodies a contradiction. On one hand, teacher leaders are classroom practitioners whose credibility amongst peers is based on classroom work. On the other hand, teachers are called to be leaders in a profession that historically has few recognised avenues for teachers in leadership roles (Lord and Miller, 2000). Similarly, Boles and Troen (1994) say that teacher leaders operate in a different 'professional space' from their teaching colleagues. The writers argue that teachers experience a sense of loss of connectedness to peers when engaging in teacher leadership. Supplementing this view Lord and Miller (2000, p.7) write, "They are teachers, one of the rank and file. Yet they are also leaders, somehow set apart from other teachers". Wasley (1991, p.166), in her study of three teacher leaders, documents that the egalitarian ethos of teaching makes it problematic for teachers to accept their colleagues as experts. I believe that the above international scenario is also applicable to our South African context. Closely linked to egalitarianism is the fact that teachers themselves act as barriers to teacher leadership.

2.5.9.4 Resistance from teachers themselves

Muijs and Harris, (2007) in their study note that in the school that exhibited restricted teacher leadership teachers did not want to take on leadership responsibilities. Similarly, Katzenmeyer and Moller (2001, p.13) write, "Leadership roles may be offered but if teachers do not step forward then both the school and the individual teacher lose". Grant also reiterates this view when she writes "for teacher leadership to occur principals need to distribute authority and

teachers need to take -up their agency role” (2006, p.527). This barrier to teacher leadership was also documented in a study conducted by Steyn and Squelch (1997). This study found that many teachers avoid participating in management issues, which involves extra work and meetings after school hours. Furthermore, many teachers view leadership roles as the SMT offloading their work onto them (Boles and Troen, 1994). Singh (2007, p.67) refers to this as ‘passing the buck.’ It is on this premise I argue, that teachers who still lead in the absence of rewards, are truly unselfish. Therefore, I believe that authentic teacher leadership is altruistic in nature, in that teacher leaders are prepared to lead, take risks, make sacrifices and proverbially ‘put their heads on the block’ for the improvement of the school as an organization. Another reason for teachers resisting teacher leadership roles is due to the lack of remuneration, incentives and rewards. Muijs and Harris (2007, p.132) write that “whether intrinsic or extrinsic teachers need to feel that their work is recognised and there is some acknowledgement of their achievements”. It may be naive to assume that all teacher leaders will embrace the notion of teacher leadership whole-heartedly, without considering issues of remuneration, incentives and rewards. I argue that these issues and their link to teacher leadership warrant the need for additional research. School ‘micro-politics’ seems to be another factor augmenting teacher’s resistance to take up teacher leadership roles. Grant (2008) reports that internal school conflicts resulted in a level of ‘bruising’ amongst teachers, which operated as a barrier to distributed leadership. Singh (2007) theorizing from a micro-political perspective reports that ‘contrived collegiality’ act as a barrier to teacher leadership development.

2.5.9.10 Lack of time to lead

A lack of time seems to be a major barrier to teacher leadership. An increased workload makes it difficult for teachers to remain full time in the class and to take on addition leadership roles (Katzenmeyer and Moller, 2001). Teachers need time for professional development, to engage in collaborative relationships and for performing leadership responsibilities. Teachers’ reluctance to take on leadership roles may not stem from a lack of interest but rather from a desire to balance their time between work and family responsibility. A study conducted by Zinn (1997 cited in Katzenmeyer and Moller, 2001) reveals that the reality of teacher leaders’ personal lives may compel them to move in and out of teacher leadership roles. The lesson for principals is that they need to build the leadership capacity of all teachers, not just a selected few. This is so that when a teacher leader has to attend to personal issues, there are other teachers to assume the lead. I argue that overcoming the issue

of time as a barrier to teacher leadership, especially in South African schools, requires intervention at a legislation level. The Post Provisioning Norms for schools need to be restructured in a way that sees an increase in the number of teaching positions in a school and a decrease in the teachers' workload. Teachers can use this 'release time' to take on additional leadership roles. However until this comes to fruition, I believe that only those affluent schools who can afford to employ additional staff and substitute teachers, can create opportunities for their teachers to find time to lead. This argument resonates with an issue I raised earlier in this chapter which is whether distributed leadership practices favour affluent school contexts? I strongly believe that both empirical and academic evidence emanating from this chapter support my argument that enactment of teacher leadership is largely dependent on factors endemic to a school context.

2.6 CONCLUSION

The development of teacher leadership is by no means a straight forward and easy process. Myriad difficulties and obstacles confront the institutionalization of teacher leadership. However, we need to forge ahead. The potential benefits of teacher leadership, especially within our South African context, cannot be left untapped. Teacher leadership is seen as a catalyst to transform many schools from their present hierarchical organisations to effective learning organisations. For individual teachers the benefits include opportunities for personal growth and empowerment. Benefits have also been associated with the teaching profession as a whole. Research findings seem to suggest that empowering teachers to take on leadership roles enhance self-esteem and work satisfaction, which in turn leads to higher levels of performance and possibly higher levels of retention in the profession (Katzenmeyer and Moller, 2001). Similarly Wasley (1991, p.12) agrees that, "major teacher shortages heighten the need for teacher leadership as a necessity to attract and retain good teachers". In line with this thinking, Griffin (1995) asserts that teacher's expertise and experience become a school resource.

I believe, that the future prospects for teacher leadership in South African should centre around incorporating teacher leadership skills development into teacher training programmes, since there is documented research evidence that suggests that teacher leadership has professionalised the teaching profession (see, Gerhke, 1991; Little, 1995). At its most profound teacher leadership offers a 'new professionalism' based on mutual trust, empowerment and support and at its most practical, it provides a way of teachers working

together in order to improve teaching and learning (Muijs and Harris, 2003). If our schools are to transform into professional learning communities, then in-depth empirical research on teacher leadership should become an urgent priority. In the next chapter, I discuss the research design and methodology employed in this study.

CHAPTER THREE

RESEARCH METHODOLOGY AND DESIGN

3.1 INTRODUCTION

In this chapter, I focus, on issues pertaining to the research design, data collection and data analysis of my study. In the first part of this chapter, I describe the research paradigm used in the study together with its ontological and epistemological assumptions. This is followed by an intensive and interrogative discussion on the chosen methodology namely case study methodology. In the second half of this chapter, I discuss the data sources and the data collection methods. Data were collected from a number of different sources. These included observations, survey questionnaires, interviews, self- reflective journal writing and document analysis. This is followed with a discussion on the different analytical tools that were used to analyse the various types of data. Data were analysed both qualitatively and quantitatively. The chapter concludes with a review of ethical issues surrounding the study as well as a reflection on the limitations of the study.

3.2 RESEARCH AIM AND QUESTIONS

The aim of the research was to understand and describe how teacher leadership happens in schools. The research questions that guide this study were:

1. How is teacher leadership enacted in a semi urban secondary school in KwaZulu- Natal?
2. What factors enhance or hinder this enactment?

3.3 RESEARCH PARADIGM

This study is located within the interpretive paradigm. Research within this paradigm is interested in meaning; how people make sense of their everyday experiences. According to Neuman (2000, p.71) “the interpretive approach is a systematic analysis of social meaningful action through direct and detailed observation of people in their natural setting in order arrive at an understanding and interpretation of how people create and maintain their social world”. The above quote suggests that ‘observation’ is at the heart of interpretive research. As a researcher, I wanted to explore how the three teacher leaders in my study understood and responded to teacher leadership development as well as the contextual factors that either promoted or hindered their development. I needed to understand the social dynamics of these educators and view the phenomenon of teacher leadership from their perspective. Therefore as

a researcher, I felt that it was extremely important to engage in direct observation techniques to capture and understand the manner in which teacher leadership was being enacted in the school. Cohen, Manion, and Morrison (2007, p. 24) explain that when emphasis is placed on “explanation and understanding of the unique and the particular case, where the interest is in the subjective relativistic social world”, then the most appropriate paradigm to locate the studying in is the interpretive paradigm because it provides a thick description of the phenomenon under study. Furthermore, Terre Blanche and Durrheim, (1999, p.6) describe how the interpretive approach provides relevant information to the researcher about the “subjective reasons and meanings that lie behind social action”. Interpretive researchers want to “make sense of feelings, experiences, social situations or phenomena as they occur in the natural world, and therefore want to study them in their natural setting”(Terre Blanche and Durrheim, 1999, p.127). I tend to agree with them. As an interpretive researcher, I needed to take into account the participants’ reasons for their actions as well as the social context of the action. For the interpretive researcher social reality is based on the person’s definition of a situation and is a product of the individual’s consciousness, (Neuman, 2000). Similarly Wellington (2000, p.16) writes that the interpretive researcher acknowledges that the “observer makes a difference to the observed and that reality is a human construct”. Therefore, I argue that the ontological assumption (i.e. the theory of reality) in this study is that there are multiple realities. In other words, the concept of teacher leadership may be understood and enacted differently by the participants in the research study.

For the participants in this study (post level one teacher leaders), their social reality is shaped by their beliefs, values and the context in which they interact. This in turn shapes their enactment of teacher leadership within this particular study. With regard to the epistemological assumption made in this study, which concerns the very basis of knowledge, its nature and form, how it is acquired and how it is communicated (Cohen *et al* , 2007) , I argue that knowledge was created in the interaction between the researcher and the respondents. Seeing knowledge as personal, subjective and unique imposes on the researcher an involvement with their subjects (Cohen *et al* , 2007). Similarly, Packer (1999) contends that research studies located within the interpretive paradigm require that the researcher have a participatory stance in the research study. The interpretive paradigm assumes that participants employ interpretive schemes, which must be understood by the researcher, and the researcher must articulate the character of the local context (Packer 1999).

The purpose of this study was not to test a hypothesis; rather I aimed to describe how teacher leadership was happening in a school and what the factors that hindered and promoted this enactment were. Therefore, the focus was on understanding complex interrelationships rather than on explanation and control. In order to capture this enactment of teacher leadership, I relied largely on qualitative data, which I argue needed to be analysed both inductively and deductively, according to what needed to be described. Considering the ontological and epistemological assumptions underpinning this study, I chose to use the qualitative case study style of inquiry.

3.4 METHODOLOGY: A CASE STUDY APPROACH

In this section, I discuss the research methodology used in the study. I also put forward an argument that supports the alignment of the chosen research methodology to the research questions underpinning the study. The research methodology used to answer the research questions was in the form of a case study. There are several definitions of a case study and little agreement on what exactly constitutes a case study. However, there seems to be consensus amongst all writers that case studies are time and context bound. For Yin, a case study is “an empirical inquiry within its real life context, particularly when the boundaries between the phenomena and the context are not clearly evident” (1984, p.23). The prime referent is the ‘case’, which is the ‘bounded reality’. In this study, the case is my school and the unit of analysis is the three teacher leaders.

Case studies are the “study of the particularity and complexity of a single case coming to understand its activity within important circumstances” (Stake, 2005, p.443). To me this suggests that Stake’s perspective on case studies is interpretive. He describes the case as a “bounded system”. According to Stake (2005, p. 444) “a case study is both a process of enquiry about the case and the product of that inquiry”. Different case studies have different purposes. Stakes (2005) differentiates between intrinsic case study, where the purpose is to illuminate in depth about a particular case and instrumental case study where the purpose is to show general phenomena. Instrumental case study research is generally used in comparison case studies. I argue that my research could be described as intrinsic because I was interested in how teacher leadership was enacted in my own unique school context and what factors enhanced or hindered teacher leadership in that particular context. Yin (2003) distinguishes between three forms of case study namely exploratory, explanatory and descriptive. I believe

that mine was a descriptive case study because it presented a complete description of the phenomena of teacher leadership within a particular context. According to Cohen, *et al* (2007, p.254) “case studies involve observing a case or phenomenon in a real-life context”. Case studies are descriptive and detailed, combining subjective and objective data. I believe that this description fits with the purpose of my research. I used quantitative (objective data) such as survey questionnaires as well as qualitative (subjective data) such as semi- structured interviews, journals, observations and document analysis to describe the phenomenon of teacher leadership.

Stake (2005, p. 448) argues that, “A case study has a form of conceptual structure and is organized around a small number of research questions which must fit the purpose of the study”. In this study, the conceptual structure is distributed leadership. As a researcher, I opted to use case study methodology because the phenomenon of teacher leadership cannot be studied outside the context in which it occurs. The context or ‘milieu’ in which the case was located was of paramount importance. According to Cresswell (1998), the site chosen for the research should be appropriate for the research aim. In this study, the school was the site and it had the unit of analysis (the three-teacher leaders) who were needed to answer the research questions. A case study is a complex entity located in a milieu or situation embedded in a number of contexts (Cohen, *et al*, 2007). Stakes (2005) therefore advises the researcher to consider the political, cultural, physical, historical and socio-economical dimensions of the context when interpreting results. Teacher leadership is an organizational phenomenon as noted by Smylie (1995). Therefore I believe, that the way in which teacher leadership is enacted will be influenced by its context.

As a researcher, I used a school observation schedule and my own personal experience to give my readers a detailed description of the school context. Yin (2003, p.13) recommends that a researcher “should use the case study methodology when the researcher deliberately wants to uncover the contextual conditions”, believing that they might be highly pertinent to the phenomena of study. Considering that one of the aims of my research study was to uncover the contextual factors that promoted and hindered teacher leadership, and taking Yin’s (2003) recommendation into account, I argue that choosing the case study methodology was the most appropriate methodology to answer the research questions. Stake (2005) contends that qualitative case studies require that the researcher spend extended time on the research site. As a researcher, conducting nuanced research on how teacher leadership was enacted in a

semi urban secondary school, I had to spend an extended time on the site and for this reason; I chose to conduct the study at my own school where I could overcome issues of time constraints and inaccessibility to information. I selected and observed the three teacher leaders in my school context over a period of two terms to examine how they enacted teacher leadership. I argue that the case study was the appropriate methodology to use because it allowed me as a researcher to examine the ‘unit of analysis’ namely the three teacher leaders, which I believe are the three bounded systems, as well as the contextual factors that mediated the enactment of teacher leadership.

3.4.1 Strengths of the case study approach

One of the strengths of case study methodology is that it can use both qualitative and quantitative data collection methods. As a researcher, I capitalized on this strength and used qualitative interview data and reflective journal data as well as a quantitative survey data to gain an in-depth understanding of how teacher leadership was enacted. Furthermore, the advantage of case study methodology is that it acknowledges the complexity of social truths as it can represent conflicts and discrepancies between the viewpoints of participants (Cohen *et al*, 2007). This, I believe, enhanced the trustworthiness of my findings. Case studies are also ‘strong on reality’ (Stake, 1995). Similarly Bell (1991, p.12) writes that a case study “provides readers with a three dimensional picture and illustrates the relationships, micro-political issues and the patterns of influence in a particular context”. I enhanced this strength by using multi-method data collection techniques. Cohen, *et al* (2007) believes that significance rather than frequency of events is the hallmark of case study research. Similarly Neuman (2000) is of the view that large amounts of information on one or few cases allows the researcher using the case study approach to go into greater depth and get more detail on the case being examined. Taking these two strengths into account and considering that, one of the aims of the study was to get a nuanced view of teacher leadership, I argue that the case study approach was the most appropriate methodology to use.

3.4.2 Limitations of the case study approach

Critics of case study methodology argue that case studies are prone to observer bias. I believe that no interpretive study can escape the element of subjectivity and biasness. However, I engaged in techniques such as triangulation, respondent validation and reflexivity to minimize my own personal biasness. Another criticism of case study methodology is its restricted applicability (Cohen, *et al*, 2007). In other words, it does not allow for generalizations. My

intention was not to generalise, but rather to describe how teacher leadership was enacted in my unique school context. A further criticism confronting case study methodology is that there is a tendency towards verification of the researcher's preconceived notions about the phenomenon. However, Flyvbjerg (2004) argues that this is a misunderstanding because it is falsification rather than verification that characterizes case studies. Case studies can be used to falsify preconceived ideas and assumptions held by the researcher. In this particular case study, I, as a researcher, had preconceived ideas about distributed leadership and teacher leadership but I also made a conscious decision to let the data speak for itself. This allowed me to remain sensitive and responsive to contradictory evidence.

3.5 ACCESS ISSUES

Stake (1995) states that a case study researcher needs to identify a 'gatekeeper' who will provide access to the site and participants. I gave my principal who was the 'gatekeeper' to the institution a letter requesting permission to conduct the research (see Appendix 9). The letter detailed the nature and purpose of the research study. I also explained to my principal why I wanted to conduct the study in my own school context. In the letter, I requested the co-operation and assistance of the principal, SMT and the level one educators. The letter also contained detail about my identity, and tertiary institution at which I was registered as a Masters of Education student as well as the contact details of my supervisor. Once written permission was granted from the principal, the project leader of the group research project requested the University of KwaZulu- Natal (UKZN) to apply for permission to conduct the study from the relevant authorities. Permission to conduct the research was sought from the Department of Research, Strategy and Policy Development, the Ethics Committee of UKZN as well as the Department of Education on my behalf (see Appendix 12).

3.6 LOCATION OF THE STUDY

The research was conducted in my own school, an urban secondary school situated in the Midlands of KwaZulu- Natal. In order to get this rich description of teacher leadership in action, I had to spend an extended period on the research site. As a full time educator, I had no option but to conduct the research in my own school. Furthermore, opportunistic sampling was used when selecting my school. Selection was based on my knowledge of and easy accessibility to teacher leaders in my own school context. As a researcher, in my own school, my positionality became a critical issue. Therefore, I needed to openly discuss my role in the institution in such a way that it identified my own personal standpoint. Based on the premise

that teacher, leadership is an organisational phenomenon, I believe that a description of the context in which the study was conducted is crucial in the understanding of the enactment of teacher leadership and the factors that hindered and promoted this enactment.

The school is a multiracial school, which, at the time of the study, was made up of 960 learners. There were five SMT members consisting of the principal, a deputy principal and three Heads of Department. The SMT consisted of two females and three males. There were 23 teachers, nine were permanently employed, 11 teachers were employed as unprotected temporary teachers (UTE) and three teachers were governing body employed. The age difference amongst the educators ranged from 21 years to 60 years. With regard to demographics, there were five Africans, three White and 15 Indian teachers. The school had a quintile four status. In addition, the school offered a wide variety of subjects. The medium of instruction was English though many learners were English second language speakers. The grade 12 pass rate was on a decline. In 2005, it was 100%, 2006 it was 97%, 2007 it was 96% while in 2008 it dropped to 89%. The school had an admission policy inline with the Constitution of the Republic of South Africa. About 35 % of the learners traveled more than 80km a day to and from school. The learner attendance was good and the drop out rate was below 2 %. In the lower grades, the teacher pupil ratio was 1: 45 whilst in the senior classes the ratio was 1:30. The annual school fee was R 1100, 00. However, about 40% of the school fees were outstanding.

The school infrastructure was made up of brick classrooms. The principal's office was in the main administration building. The deputy principal's office and the HoD offices were adjacent to the staffroom. The principal office was about 40m away from the offices of the other SMT members. The principal had about 25 years of experience in the school. He was a level one educator for 13 years until he was promoted to principal in 1997. Notice and signboards were clearly visible throughout the schools. The general appearance of the school was good. Buildings and gardens are well maintained. There was a library but it was not fully functional because there was no one to manage the library. There was one physics laboratory that was in a very dilapidated state. The furniture had been vandalised by learners. Most of the practical equipment and apparatus were broken and had not been replaced. This vandalism resulted due to a high physics staff turnover and a lack of accountability on the part of the new incumbent. There were sporting facilities for soccer, netball, volleyball and cricket.

These sporting codes were played at an interclass level. Each HoD was in charge of one sport code. Different sporting codes were played during activity time every Wednesday.

The staffroom was in a satisfactory condition with the basic long tables and teacher chairs.

About 70 % of the teaching staff had lunch in the staffroom while the rest of the staff sat either in their classrooms or in their offices. About 50% of the SMT members had their lunch in the staffroom. The atmosphere in the staffroom was relaxed and there generally were cross table conversations.

The professional ethos of the school was commendable. Teachers were punctual, disciplined, and the average daily teacher attendance was about 90%. The principal generally conducted the assembly on a Monday whilst the HoDs and post level one educators were given opportunities to conduct assemblies once a week on a Thursday. There was a culture of teaching and learning that permeated through the school. Learners were always supervised and relief educators substituted for educators who were absent. A few learners bunked lessons and loitered in between the blocks and in the toilets. The schools employed two security guards, one to monitor the gate and the other to monitor the junior blocks where most of the loitering happened. The school was fully fenced. The school had a seemingly cordial relationship with the SGB. The SGB chairperson was frequently seen in school assessing the functionality of the school and liaising with the teachers and the management. The school times were from 07:45 am to 14:45 pm; with two half, –an- hour lunch breaks. Finally, the overall impression of the school could be described as purposive. The above is a brief description of the context of the school and it is important in the context of the study because of its impact on the enactment of teacher leadership. As the dissertation unfolds the context will become more visible and its impact on the teacher leaders more clear.

3.7 PARTICIPANTS

According to Henning (2004), researchers should select a sample that best answers the research question. In this study, I used purposive sampling. According to Cohen *et al* (2007), purposive sampling is used in order to access ‘knowledgeable people’, those that have an in-depth knowledge about particular issues. It is my view that the chosen sample in the study (the three teacher leaders) was appropriate because they were my unit of analysis and primary source of data. I wanted to describe and understand how teacher leadership was enacted in the school therefore; I chose participants who I thought displayed characteristics of teacher leadership. I used the following criteria to guide my selection. Firstly, I looked for educators

who were recognized by colleagues as being very influential in school decision-making and processes. Secondly, I was interested in educators who were accorded a high level of school-based responsibility by both colleagues and the school management team. Finally, I also considered the educator's role in making a significant contribution to an aspect of social justice in the school and the school community.

Using above criteria I was able to identify seven potential teacher leader participants. However, being a researcher in my own school context, I had to acknowledge the issue of power relations between myself as a head of department and level one educators that belonged in my department, and how it could possibly affect the validity of my result. I therefore chose not to use any educator that was in my department. From the remaining four educators, I selected three participants that I thought best epitomised the concept of teacher leadership. I informed the three participants about the nature and purpose of the research and the amount of work it would require them to do. I asked the three participants to sign a consent form (see Appendix 11). They were all excited to be part of the research project. All three participants were female. This could have been a limitation to the study. I argue that the issue of gender does influence the take up of teacher leadership roles. Grant lends support to my argument when she writes, "where teacher leadership exists, stereotypic roles for men and women may be ascribed" (2005a, p.52). Therefore I believe that, the fact that all participants were female might have influenced their enactment of teacher leadership within this particular school context.

3.8 DATA COLLECTION

A multi-method approach was used to collect data. Data collection techniques were both quantitative and qualitative. Being a novice researcher, I acknowledged that I had to develop skills required to collect case study data. Therefore, when the data collections instruments were designed, I chose to pilot the focus group and individual teacher leadership interviews schedules. I wanted to ascertain during the pilot stage if there were any misconceptions, ambiguities or redundancies regarding the interview questions and process. At the same time, I used the piloting stage to develop my interviewing skills. I did not pilot the survey questionnaires. These questionnaires were piloted and revised by Khumalo (2008) in her teacher leadership survey study in 23 Umlazi schools in KwaZulu-Natal. I was confident that the survey questionnaires would give me comprehensive coverage on the phenomenon of

teacher leadership in the case study school. I believed that the nature of the other research instruments such as the observation schedule, documents and the reflective journals did not lend themselves to be piloted. These data collection instruments were not piloted.

My unit of analysis and primary source of data was the three teacher leaders in the school. The secondary sources of data were the *South African School Act (1996)* and the *Norms and Standards for Educators (2000)* documents. Both documents have the notion of distributed leadership embedded in them. Documents such as the minutes of staff meeting, management meeting, the year planner and the Integrated Quality Management System (IQMS) documentation also provided a secondary source of data.

Data collection procedures in case study research are not routinized (Yin, 1984, p.57). My data collection process was not routinized but rather flexible and driven by convenience. I had to be sensitive to the fact that most of my research instruments such as the focus group interview, the individual teacher leadership interviews and the reflective journals required a lot of time from my participants (teacher leaders). In other words, I could only collect data when it was convenient for my participants. The pace of my data collection process was largely determined by my three teacher leaders. At times, this was frustrating to me as a researcher but I took solace in the fact that their information was invaluable to me as a researcher. I needed them and therefore I had to exercise patience during the data collection process. The data collection involved a three level research process that began in October 2008 and continued up until April 2009.

3.8.1 School observation schedule

At the first level of the research process, I engaged in school observations, observing the school as an organisation. Observation as a research technique is generally employed when the researcher wants to study a phenomenon '*in situ*'. In other words, it offers the researcher, the opportunity to gather 'live' data from naturally occurring social situations (Cohen *et al*, 2007). A school observation schedule (Appendix 1) was used to develop a contextual account of the school. The enactment of teacher leadership is largely influenced by its context therefore having this knowledge about the context helped me as a researcher to understand the social interactions within the school and how this promoted or hindered the enactment of teacher leadership. When collecting data using this instrument, I had to be very sensitive to my own positionality, considering that this was my own school context. In order to get a fair assessment of the school context, I liaised with the principal, SMT members and level one

educators. During informal conversations, I put forward to them some of the questions in the observation schedule and asked them to express their views on the questions. Most of their views about the school context were in agreement with each other, especially when the questions required factual answers. However, the process also revealed some contradictions and controversial issues. Whilst I had developed my own interpretation of the school context, I felt that I had to cross check my interpretation with other individuals functioning in the same context. This I felt would reduce my own personal bias and subjectivity.

3.8.2 Survey Questionnaires

At the early stages of the research, during the second week in October 2008, all educators in the school were asked to fill in a survey questionnaire on teacher leadership. Before they filled in the surveys they were asked to sign an informed consent form (see Appendix 10). According to Cohen *et al* (2007, p.205) “surveys gather data at a particular point in time with the intention of describing the nature of existing conditions or determining the relationships that exist between specific events”. A researcher using the survey technique, will be seeking to gather large-scale data from a representative sample population in order to say with a measure of statistical confidence that certain observed characteristics occur with a degree of regularity (Cohen *et al*, 2007). In my study the post level one educators filled in a slightly different questionnaire (Appendix 2) to the SMT members (Appendix 3).

The questionnaires included both closed ended and opened ended questions. The post level one educator questionnaire contained Section A, Section B and Section D. Section C was incorporated in the SMT questionnaire. Section A and Section B included close-ended questions while section D had open-ended questions. Section A required the participants to fill in important biographical information with a cross format. The purpose of this biographical information section was to reveal how variables such as, gender qualification and teaching experience influences teacher leadership roles and teacher perceptions about leadership. Section B1 was used to gather teacher’s perception about leadership in the school. Section B2 examined the extent to which teacher leadership was happening in schools and the roles teacher had taken up. Section B3 focused on teacher leadership roles in various committees. Section B4 examined what teacher’s perceptions were of the leadership context and culture in their schools. Section D contained four open – ended questions on teacher leadership. These open -ended questions enabled participants to communicate their experiences and opinions on a specific issue in their own words. Participants could explain

and qualify their responses and avoid the limitations of preset categories of responses. The weakness of opened questions was that they could lead to irrelevant and redundant information (Cohen *et al* ,2007, p. 323) Despite this weakness I believed that the open-ended questions were valuable in that it provided a thick and rich description of how teacher leadership was being enacted in the school.

Surveys questionnaires are useful to collect data on phenomena that cannot be directly observed. Through the survey data, I was able to understand how most teachers in the school perceived the enactment of teacher leadership in their school context, and the factors that promoted and hindered this enactment. Surveys can be exploratory, confirmatory, descriptive or analytical (Shavelson and Towne, 2002). I argue that this small-scale survey was descriptive. According to Cohen *et al* (2007, p. 213) “descriptive surveys describe data on variables of interests”. Variables of interest in the survey questionnaire were the *teacher’s perception about teacher leadership in schools and the extent to which teacher leadership is happening in schools*. I am of the view that these variables were effective because it allowed me to collect appropriate data that helped me in answering of the research questions. Surveys are classified as longitudinal, cross-sectional or trend studies (Shaveson and Towne, 2002). I believe that this small scale survey was a cross sectional survey because, according to Cohen *et al* (2007), cross sectional surveys are used to gather information on a population at a single point in time.

One of the weaknesses of survey questionnaires is the low response rate and respondents cannot seek clarification if the researcher is not present (Neuman, 2000). To overcome this weakness, I asked my principal permission to address the staff on the issue of the survey questionnaires. I strategically called for this meeting during exam time, because learners were dismissed after they had written their exams and I knew that teachers would have some spare time to fill in the survey questionnaire forms without feeling burdened or pressured by a time limit. I also used the opportunity to clarify any queries that arose and ensured all questionnaires were completed and filled accurately. Most staff members completed the survey forms during a staff meeting. I gave out five SMT survey questionnaires and 23 post level one survey questionnaires. Cohen *et al* (2007, p.321) argue, “Self administered questionnaires in the presence of the researcher yields greater returns and large amounts of data can be collected simultaneously from a large number of respondents in a short space of time”. I received all SMT questionnaires back and 20 of the 23 of the post level one

questionnaire back. Three post level one educators chose not to participate. In other words, the response rate for the SMT questionnaires was a 100% whilst the level one educator's response rate was 87%. One advantage of questionnaires is that anonymity increases honesty in responses (Neuman, 2000). The questionnaires were used to verify qualitative responses from the three teacher leaders, pertaining to the types and frequency of involvement in teacher leadership activities. Furthermore, the data from the post level one questionnaires was used to cross check, corroborate and verify responses from the SMT questionnaires. This revealed consensus, contradictions, tensions and dilemmas on the phenomenon of teacher leadership as perceived by the post level educators and the SMT. This, I believe enhanced the depth and richness of the phenomenon under study. I argue that the questionnaires in this study served as a reliable foundation for questions used in the focus group interview as well as the individual teacher leadership interviews.

3.8.3 Direct observations

At the second level of the research process, I adopted a qualitative approach. Using a teacher leadership observation schedule (Appendix 4) borrowed from Harris and Lambert (2003) and Grant's (2008) zones and roles model for teacher leadership (Appendix 5), I observed the three teacher leaders on a regular and on going basis during the fourth term of 2008 and first term of 2009. I attempted to ascertain information about what leadership roles they engaged in and examined the zones in which they exhibited these leadership roles. These zones included leadership in the classroom (zone one) working with other teachers in the learning area (zone two), leadership activities at a whole school development level (zone three) and finally leadership activities that extended into the neighbouring school community (zone four). I deliberately chose these two terms because I believed that many leadership activities and opportunities arose during these two terms. Observation is at the heart of interpretive research. Yin (1984, p.84) describes how "direct observations can range from formal to casual data collection activities". My observation was more formalised because according to Yin (1984, p.85) during "informal observation, the researcher measures the incidence of certain types of behaviour during certain periods of time in the field". During my observation of the three teacher leaders, I directed my focus mainly on their leadership enactment. Furthermore, Grant's (2008) zones and roles model for teacher leadership also guided and directed my formal observations of these teacher leaders. The aim of my research was to describe teacher leadership in action. I wanted to capture this enactment of teacher leadership through direct cognition rather than relying only on mediated or inferential methods (Cohen *et al*, 2007).

Cohen *et al*, assert that, “Direct observations have the potential to yield more valid and authentic data” (2007 p.397). The observation schedule that I used to observe the three teacher leaders was structured, with specific observation categories pertaining to the enactment of teacher leadership. It was based on a continuum ranging from a weak to a strong enactment of teacher leadership. The three teacher leaders were told during the initial buy-in stages of the research that part of the research study required me to observe them in the school context. I assured them that I would be as non-intrusive as possible. However, observing the three teacher leaders was not as easy as I initially thought it would be.

It is difficult to separate one’s role as a researcher from that of a teacher when one is conducting research in one’s own school context. Considering that I had a full teaching load, it was difficult to find time to observe the three teacher leaders. I observed the three participants during staff briefings, lunch breaks, school based professional development workshops and during sporting activities times. I listened attentively to their accounts of what had transpired in their classrooms during the teaching periods. I wanted a first –hand view of what was happening in their classrooms so I asked them for permission to visit their classrooms during a lesson. I told them that I identified them as teacher leaders based on their skills and characteristics that epitomised teacher leadership and I wanted to see how they enacted these skills and characteristics in a classroom situation.

In order to reduce the risk of a lesson being orchestrated for my benefit, I asked for permission to visit them unannounced. Permission was granted and I observed the three teacher leaders in a classroom situation. I made detailed notes during the lesson. I used the preset categories in the teacher leader observation schedule (Appendix 4) and Grant’s (2008) zones and roles model for teacher leadership (Appendix 5.1) to inform my notes. I also used an ‘analytical framework for teacher leadership’ (Appendix 5.2) to inform my observations. The development of this analytical framework for teacher leadership was a joint initiative of the ELMP, MED students and the research coordinator. It is an extension of the zones and roles outlined in Grant’s (2008) zones and roles model for teacher leadership (Appendix 5.1). The roles were translated into several indicators that depicted the enactment of teacher leadership. The participants’ behaviour, actions and leadership activities were cross-referenced with these indicators.

During the last term of 2008 when exams had commenced and teaching was suspended, I was able to observe the teacher leaders more frequently. I made comprehensive field notes on what I observed about each teacher leader on a regular basis, as well as entries on the predetermined observation schedules. Cohen *et al*, warn that “Observation as a research tool carries the risk of researcher bias and subjectivity. It is prone to difficulties of interpreting and inferring what the data means” (2007, p.412). Whilst I accept this as a limitation of the study, I did attempt to reduce the element of subjectivity by firstly observing the participants over a long period. Morrison argues that:

by being immersed in a context over a long time a more holistic view will be gathered about the interrelationships of factors. Such immersion facilitates the generation of thick descriptions of social processes and interactions and this might result in accurate explanations and interpretations of events (1993, p.88).

During observation there is also the problem of ‘participant reactivity’ (Cohen *et al*, 2007) in that participants may change their behaviour if they know that they are being observed. This poses a threat to the collection of authentic data. As an interpretative researcher, I was aware of this threat and I tried to minimize it by extending the observation period over two terms (five months). Cohen *et al* (2007, p.412.) refer to this as ‘habituation’, when the researcher remains in the research situation for such a long time that the participants revert to their natural behaviour. Secondly I always wrote detailed notes during or sometimes immediately after the observation events. This helped to reduce selective data entry, which could have led to interpretations becoming clouding due to a lack of memory surrounding the observed event. Considering the subjective nature of observations, I also collected data through other research instruments to provide corroboration and triangulation to ensure that reliable inferences are derived from reliable data. This, I believe, improved the trustworthiness and validity of the data.

3.8.4 Self reflective journals

At the third level of the research process, I adopted a more interior look or an ‘emic view’, (Cresswell, 2002) into teacher leadership. The three teacher leaders were asked to keep self-reflective journals (Appendix 6). The purpose of the journal was to allow the teacher leader to reflect on their lives as teacher leaders and to describe their experiences and make meaning of those experiences. Seven journal entries had to be made over a period of five month, from

November 2008 to April 2009. Self-reflective journals are useful as a research instrument because they provide:

valuable accounts of the perspectives and interpretations of people in a variety of educational settings and the ways in which educational personnel come to terms with the constraints and conditions in which they work (Goodson,1983, cited in Cohen *et al* , 2007 p.198).

I avoided given all the journal entries to the participants at one time because I did not want to risk participant fatigue or frustration so I only gave them one journal entry every two weeks. As an incentive and a token of my appreciation, I gave each of the three participants' a hard cover 32 page journal and a pen. I appealed to them to allow me to photocopy each journal entry as soon as they had finished with it. In this way, I had a copy of each of the journal entries in case the journal got lost. Secondly, by collecting the journals and photocopying them on a regular basis I believed that this gave the participants intrinsic motivation to complete each journal entry within the allocated period.

One the limitations of journal writing is that the researcher is not present at the time when the participants are writing their journal entries and therefore the participants may not get clarification on any queries they might have (Cohen *et al* , 2007).This might result in misinterpretation of the questions. Being a researcher in my own school context helped to reduce this problem because the participants had direct access to me if they were unclear about any question in the journal entries. I firmly believe the strength of journal writing is that it gives the participant enough time to think and respond to questions. However, it can be very time consuming for the participants in that each journal entry can translate into five to six written pages. For the researcher this data collection method is also time consuming especially, when the journal entry questions are being designed. Thereafter the researcher's role in this data collection method is limited to merely collecting the entries and photocopying them.

3.8.5 Interviews

The teacher leadership interview process began with an initial focus group interview (Appendix 7) with all three-teacher leaders at the beginning of October 2008.The purpose of this interview was to outline the research process and obtain participant buy-in. Later in the

research process during February and March 2009, participants were each subjected to a loosely- structured individual teacher leadership interview (Appendix 8.1 to 8.3). The purpose of the individual interview was to allow the participant to elaborate on any issue raised in the journal entries. The interview schedules were designed to elicit the three-teacher leader's perceptions of teacher leadership and what they perceived to be the factors that promoted or hindered their enactment of teacher leadership within that particular school context. The interviews were used as a prime source of data. The 'unit of analysis' for both interviews was the three teacher leaders.

3.8.5.1 Semi –Structured Focus Group Interviews

According to Cohen *et al* (2007, p.376) “focus groups are contrived settings bringing together a specifically chosen sector of the population to discuss a particular topic where the interaction of the group leads to the emergence of data”. Focus group interviews are useful for gathering data on collective attitudes, values and opinions, of a homogenous group of participants (Cohen *et al*, 2007). The focus group interview with the three teacher leaders was aimed at obtaining several perspectives; and to elicit a multiplicity of views and emotional processes associated with personal experiences of teacher leadership.

The focus group interview took place at my home and I arranged a date and time that was convenient for all three participants. I informed the participants in advance that the discussion would last about one hour. At the initial stages of the focus group interview, I outlined the full purpose of the research to the participants and I explained how the data was going to be used. I told the participants that we needed to establish a sense of trust amongst each other. I appealed to them to treat all information discussed in the interview as confidential and acknowledge responsibility to ‘anonymise’ the data from the group (Gibbs, 1997, p.5.) Most questions in the semi-structured focus group interviews were open-ended which I argue was appropriate because it allowed me as the researcher to probe further when the need for deeper insight into an issue arose. I believe that by asking the participants to give examples of the opportunities they created for teacher leadership, it forced the participants to verify their responses. Through these examples, I gained a deeper understanding of the extent to which teacher leadership was promoted or hindered by the school context. Using the semi-structured focus group interview, I was able to ask relevant questions thereby directing the data collection process towards the research aims. Cohen *et al* assert that “focus group interviews

give the researcher more control over the research process because the questions used by the researcher limits the discussion to the topic under investigation”(2007, p.376) .

To increase validity of data, I made a tape recording of the focus group interview only after the three participants granted permission. I allowed one person to speak at a time and all participants had an opportunity to speak and give their views on each question that I posed to the group. I facilitated the process and guided the discussion towards my research aims. I tried to be a good listener and not to let my preconceptions and ideologies influence the research data collected. In other words, I attempted to remain unbiased by the preconceived notions of distributed leadership theory. This allowed me to remain sensitive and responsive to contradictory evidence. Cohen *et al* argue that in focus group interviews the “participants interact with each other rather than with the interviewer and it is from the interaction of the group that the data emerges” (2007, p.376). The focus group interview focuses on subjective experiences of people who had been exposed to a similar situation. In this study, the focus was on the personal experiences of the three teacher leaders in the same school context.

I argue that the focus group interview was useful as a research tool because it was economical on time. A large amount of data was collected in a short space of time. I do acknowledge however, that focus group interviews have their limitations. Firstly focus group interviews may produce what I refer to as ‘group think’, discouraging individuals who have a different view from speaking out in front of the other group members. When I felt that a contrived consensus was forming, I redirected the conversation to reveal the contradictory views raised by individual participants. In this way, I tried to ensure that when there was group consensus, it was through negotiation rather than being contrived. This, I believe, yielded data that are more authentic from the interview process.

Secondly confidentiality of the participants cannot be guaranteed (Kvale, 1996).Therefore this might have resulted in the participants not being completely honest about their values, attitudes and beliefs that might have influenced the way in which teacher leadership was being enacted in their school context and the possible factors that promoted or hindered the enactment of teacher leadership. Despite Morgan’s (1994) reassurance that focus groups are quick and a relatively inexpensive way of collecting data, the discussion from the interview generated a lot of data that took a long time to transcribe. A further criticism of focus group interviews is that group dynamics might lead to the non- participation by some members and

dominance by others (Kvale, 1996). I argue that this generally happens if the sample size is large. Therefore, I minimised this weakness by limiting my sample to only the three teacher leaders and ensuring that questions were directed to all three participants. When I felt that any one participant was monopolizing the conversation, I tactfully redirected the questioning so that the other less vocal participants were drawn back into the conversation.

Like most data collection instruments, focus group interviews are also influenced by the issue of power relations between the researcher and the participants and between the participants themselves (Morgan, 1994). The participants might have perceived me as having power and expert knowledge on the topic of teacher leadership. Therefore, they might have been hesitant to speak or express their own personal views on teacher leadership openly and honestly. I tried to minimize this by reassuring participants that I was no expert on the topic of teacher leadership, especially within the South African context. Rather knowledge on the concept of teacher leadership within a South African case would be created through the interaction between the researcher (me) and the participants (them). This view of knowledge creation (epistemology) is aligned to the interpretive paradigm. As I have argued earlier in this chapter, I believe there was good alignment between the paradigm in which my research was located and the data collection technique. During the focus group interview process, I also tried to ensure that my tone of voice was unthreatening and that my questions were not heaped with academic jargon. This I believe contributed to the relaxed atmosphere that persisted throughout the interview process, which might have improved the degree of honesty of the participants' responses, leading to greater authenticity and validity of data.

Ethical issues were addressed through the signing of informed consent forms and through respondent validation. Participants were given the full transcripts of the focus group interview to read in order to verify that spoken words were transcribed accurately and that there were no misinterpretations of meanings. This contributed to the validity and trustworthiness of the study.

3.8.5.2 Loosely-structured individual teacher interviews

The purpose of my research study was to explore how teacher leadership was happening in my own school. Therefore, I needed to ask questions about what teacher leaders knew, believed and did in the case study school. The data collection technique that I used to elicit this information was the "Teacher Leader individual interview schedule" (Appendix 8.1 to

8.3). The interview schedule was loosely structured because it was based on journal entries of the individual teacher leader. Therefore, questions could not be planned in advance but emerged as the research process progressed. Questions were also different from one teacher leader to the other depending on the responses in their journal entries. According to Cohen *et al* (2007, p.353), my research instrument could be described as an ‘interview guide approach’ in which topics and issues to be covered are specified in advance in an outline form and the interviewer decides the sequence and the working of questions during the course of the interview. In my interview schedule, three issues were outlined. I wanted to ascertain, during the interview process, information about:

- i) The personal attributes of teacher leaders
- ii) The zones and roles teacher leaders were engaged in
- iii) The main barriers to leadership that teachers experienced

The issues outlined in the interview schedule were sequenced in a manner that allowed me to ask the “what” questions first and then the “why” and “how” questions. According to Kvale (1996, p.132) the researcher needs to ask easier less threatening questions earlier in the interview to put the interviewee at ease. Once the teacher leaders had completed their journal entries, I collected the journal entries and read them. Thereafter I formulated a set of loosely structured interview questions for each participant. The data from the journal entries of each teacher leader informed and guided the ‘individual teacher leader’ interview process. An appointment for an interview was made with each participant ahead of time. Prior to the interview, I informed each participant that the interview would take about half an hour. The context in which the interview was conducted was of critical importance. Dick (2005) cited in Singh (2007) argues that naturalistic conversations might be encouraged in surroundings that are as relaxed as possible. Therefore, I asked each participant to choose a time and place that was convenient for them. The interviews were conducted at the home of each participant over a weekend. I think the participants felt secure enough in their own home environment to talk freely. At the interview, I outlined the full purpose of the research and how the interview data was going to be used. I assured the participants that all information would be confidential and no names would be used in the transcribed notes. The three individual interviews were audio taped only after each participant gave consent. Like in the focus group interview, using a tape recorder helped to capture exact quotes, and it took the pressure off me as a researcher and allowed me to listen attentively to each participant. However, the disadvantage of the

audiotape is that it is selective, it filters out contextual factors, non-verbal and visual aspects of the interview (Cohen *et al*, 2007).

According to Cohen *et al* (2007), an interview is a social interpersonal encounter. Thus, power-relationships could have influenced the interview process. My participants might have perceived me (the MED student) as having knowledge and hence power. Therefore I took the same precautions as I did in the focus group interview so as not to compromise the freedom and honesty in the interviewee' responses. Like in the focus group interview, I listened attentively, keeping my tone of voice and questioning at a level that contributed to a relaxed atmosphere as well as avoiding academic jargon (Kvale, 1996). Furthermore, I acknowledge that being the head of department interviewing post level one educators might have also influenced the honesty of the responses to any large degree. However, the participants and I share a friendship built on mutual trust and respect. Therefore, I do not think my positionality influenced the honesty of the interviewee's responses. During each interview, I remained impartial to the views of the participants (Kvale, 1996). I did not impose my own views nor did I give any advice. However when I felt that the interview was losing focus I intervened by asking another question relevant to the topic. I used the interview process to clarify any misunderstanding I encountered in the journal entries and to probe deeper into issues that were only briefly described in the journal.

Using this research instrument, I was able to collect a large amount of data on the phenomenon of teacher leadership as experienced by each of the three teacher leaders in a short space of time. Whilst designing the research instrument was not time consuming, transcribing the large volume of data was. Each of the thirty-minute interviews was transcribed into approximately 14 pages of textual data. The transcribing process for the data collected from each interview took almost 5 hours. Nevertheless, I felt it was crucial to make full transcripts in order to minimize researcher biasness and subjectivity. Participants were given the full transcript of their individual interview to read and verify. This process is known as respondent validation and it contributes to the validity and trustworthiness of the study (Cohen *et al*, 2007). One of the shortcomings of transcripts is that they generally do not include non-verbal gestures. However Cohen *et al* (2007) argue that even if the transcript does include non-verbal gestures, it is still subjected to the reader's interpretation. I tend to agree with them.

The strength of this research instrument is that it increases the comprehensiveness of the data and makes data collection systematic for each respondent (Cohen *et al*, 2007). However, its weakness is that the interviewee's flexibility in sequencing and wording questions can result in interviewee responses deferring thus reducing the comparability of the responses (Cohen *et al*, 2007). Lincoln and Guba (1985, p.269) make the point that "the choice of interview type is linked to the issue of 'fitness for purpose'. If a researcher wants to acquire unique non-standardized information about how an individual views the world, then the researcher should engage in qualitative open-ended unstructured interviews. This is precisely what I did.

The interview process allowed me to gain a deeper insight into each participant's understanding of teacher leadership, as well as their individual beliefs, attitudes and values about their role as a teacher leader. Therefore, I argue that the research instrument was efficient because there was a 'fitness of purpose' link between the research instrument and the research questions.

3.8.6 Document Analysis

Documents are useful in "rendering more visible the phenomenon under study" (Prior, 2003, p.87). The documents that I chose to analyse, to answer the research question included documents such as the school year planner, minutes of staff and management meetings, IQMS assessment documents of the three teacher leaders, as well as the *Norms and Standards for Education (2000)* document and the *South African Schools Act (1996)*. The school year planner was used to determine the extent to which teacher leadership was being enacted in the school context and what leadership roles teachers engaged in. I wanted to explore whether these educators had been nominated, delegated or did they spontaneously volunteer to be involved in planning? I chose to analyse the school year planners over a three-year period (2007, 2008 and 2009) to look for trends in teacher participation in leadership roles. I believed that this trend would yield much more reliable data about how distributed leadership was being practiced in the school.

I chose to collect documents such as the minutes of the staff and management meetings, as well as IQMS documentation of the three teacher leaders that were written in 2007 to 2009. My choice was guided by the following reasons. Firstly, a large volume of documents had been generated for each particular year. Therefore, I limited the documents to those generated in the years 2007 up until 2009 so that the data could be reduced to a manageable size for analysis. Four hundred and sixteen pages of data were collected from the 2007,2008 and 2009

documents alone. By restricting the number of years to 2007, 2008 and 2009 only, I may have missed documentation that might have revealed how the three teacher leaders enacted teacher leadership in the previous years. However, in my defense I believe that what may not have been revealed by the missing documents could be ascertained from the interviews and the reflective journals.

In mid November 2008, the minutes of the staff and management meetings were formally requested from the principal since these were official school documents. I made photocopies of the documents and return the originals to the principal. These documents were useful in developing my understanding of the leadership roles enacted by the three level one-teacher leaders. Were they influencing the culture of the meetings? How strong were their voices in these meetings? To get greater insight into the attitude and the beliefs of the SMT with regard to distributed leadership and teacher leadership, I analysed the minutes of the SMT meetings. Did the SMT genuinely devote time and political will to address the matters raised by teacher leaders?

The IQMS (integrated quality management system) documents and schedules were collected because the data in these documents were a summative evaluation record of the teachers' performance in various portfolios. Level one educators are evaluated in seven performance areas, and I believe that these performance standards (1-7) are closely linked to the four zones in Grant's (2008) model of teacher leadership. Furthermore, I wanted to know if the teacher leaders were engaged in any leadership roles beyond performance standard seven. Performance standards, 8 -12 are applicable to formal management personnel only (principal, deputy principal and the heads of department). Were my teacher leaders engaging in any leadership roles that were indicative of performance standards 8-12? I am of the opinion that the IQMS documents were high on reliability and validity because the scores that teachers get for each performance standard are normally backed up with authentic evidence. IQMS documents are the private and confidential property of the respective educator and the school; therefore, I had to get written permission from each participant granting the principal permission, to give me a copy of each participant's IQMS documents. Through the IQMS schedules, I was able to ascertain whether my three teacher leaders were involved in and served on the Developmental support group (DSG) and the Staff development team (SDT). Involvement in these committees by the participants might signal a tendency to engage in leadership activities at a school level, in other words, in zone three.

I also chose to analyse policy documents such as the *Norms and Standards for Educators (2000)* and the *South African Schools Act (1996)*. The *Norms and Standards for Educators (2000)* document were used to inform the study on the seven roles that educators are expected to take on, among them that of a leader, manager and administrator. *The South African Schools Act (1996)* is explicit about the democratic management of schools. I believe that both documents were relevant to the research aim because they have the notion of teacher leadership and distributed leadership embedded in them. One of my aims in this study was to examine the extent to which these three teacher leaders enacted teacher leadership roles as envisaged in these policy documents.

According to Yin (1984, p.80) the most important use of document analysis is to corroborate and augment the evidence from other sources. Evidence from each source document was verified against each other. I personally refer to this as an ‘inter- document verification processes. The evidence from the document analysis was then crosschecked with data collected from other research instruments. I was also weary of the fact that the documents, especially the minutes of the staff and SMT meetings “should not be interpreted as if they contained unmitigated truths” (Yin 1984, p.81). Rather, I acknowledged that these documents were social products and were written for some specific purpose and a specific audience other than those of the case study (Cohen *et al*, 2007). These documents are often selective and deliberately exclude detail. Therefore, they should be interrogated, contextualised, interpreted and not just merely accepted. This is a limitation of using document analysis as a research instrument. To minimize this weakness I was constantly guided by the following question “is there any important information between the lines” (Cohen *et al*, 2007, p.195). I knew of course that any inferences I made from the data in the documents needed to be corroborated with other sources of information. A further criticism of document analysis is that the data comes in different forms and that makes analysis of the data difficult especially if content analysis is, being used to analyse the data (Yin, 1984). It is also very time consuming considering the sheer volume of data.

3.9 DATA ANALYSIS

Considering that, I had collected different types of data I had to use different methods of analysis. Data were analysed both quantitatively and qualitatively. However, some data were highly descriptive, such as the data collected by the school observation schedule and the

teacher leader observation schedule and required more of a narrative description rather than an in-depth thematic analysis.

3.9.1 Quantitative Analysis

Data generated from the highly structured closed -ended questions in the survey questionnaires were analysed using the Statistical Package for Social Science (SPSS). Descriptive statistical analysis was used to analyse the questionnaires. Prior to the data being captured on the SPSS system, questionnaires were checked and edited to identify and eliminate errors made by the respondents. Cohen *et al* (2007, p.503) describe descriptive analysis as “a general type of simple statistics used by researchers to describe basic patterns in data” Using descriptive statistics; I was able to transform large amounts of numerical data from the survey into single numbers (usually percentages) which gave the data more description and meaning between variables. It also gave more insight into the relationships between different variables (Neuman, 2000). The SPSS program enabled the data in the study to be summarized at a glance through a percentage frequency distribution. The large amount of information gathered from the questionnaires was reduced into readable and analysable bar graphs and pie charts. Descriptive analysis allowed information to be coded, which was useful because it allowed me to link the analysed data to Grant’s (2008) model of teacher leadership. The opened ended questions in the survey questionnaires underwent thematic content analysis. The data were coded and classified according to themes and to Grant’s (2008) model of teacher leadership. However, the data could not be easily compared across participants and were difficult and time consuming to code and classify.

3.9.2 Qualitative Analysis: Thematic Content analysis

Data from the interviews and journals were analysed qualitatively using thematic content analysis. Content analysis is a process in which many words of a text are coded and classified into fewer categories (Cohen et al, 2007). Ezzy (2002) argues that content analysts know in advance what they are looking for in a text as well what the categories for analysis will be. My second reason for using content analysis was “its flexibility in analysing data” (Cohen *et al*, 2007, p. 490). While inductive approaches may not occur during the early stages of content analysis, they can be accommodated by content analysis later on in the analysis process as new themes and interpretations emerged (Ezzy, 2002). Considering that my second research question was a very opened –ended question, I had to allow for the possibility that new

themes and categories could emerge from the data and that they could be analysed inductively using the content analysis process.

Cohen *et al* (2007) contend that the categories are usually derived from theoretical constructs. In this study, the theoretical concept of distributed leadership formed the background to the analysis. I chose to use content analysis to analyse the data because my intention was to analyse the textual data using Grant's (2008) zones and role model of teacher leadership and Gunter's (2005) characterization of distributed leadership namely 'authorised, dispersed and democratic' distributed leadership. Data analysis consisted of both description and thematic development. Thematic concepts were generated through a process of coding described as an operation by which data is broken down, conceptualized and put back together in new forms (Neuman, 2000). Open coding was used to label and categorize phenomenon while selective coding was used to integrate categories (Neuman, 2000) to build the initial theory framework, i.e. distributed leadership. The data from the three teacher leaders were compared, to identify literal and theoretical replications across their cases. Any emergent theory was compared with existing literature on distributed leadership and teacher leadership to examine the similarities and differences.

The unit of analysis was then located within its larger institutional context to determine the factors that enhanced or hindered the enactment of teacher leadership. During the process of content analysis, links were made between categories to ensure that the richness of the data was retained. Recurring patterns and themes were examined and related to the theoretical framework. The interviews and the self-reflective journal data were analysed in-depth. However documents such as the school year planner, minutes of meetings (staff, SMT, learning area, SGB meetings) as well as IQMS documents of the three teacher leaders were analysed more broadly on a qualitative and descriptive level to determine the level at which teacher leadership was enacted in the case study school. The limitations associated with the content analysis process are that words are inherently ambiguous and therefore open to misinterpretation (Ezzy, 2002). Secondly according to Cohen *et al* (2007, p. 490) coding and categorising information may lose the nuance richness of specific words and their connotations.

3.9.3 The Analytical tool: Grant’s Model of Teacher leadership

As already discussed in *Chapter Two* Grant’s (2008) zones and roles model of teacher leadership, demonstrates how teachers are able to lead in four areas or ‘zones’ (Grant 2006). The diagram below represents Grant’s (2008) *zones* and *roles* model of teacher leadership, which was used for the analysis of the data from the three teacher leaders.

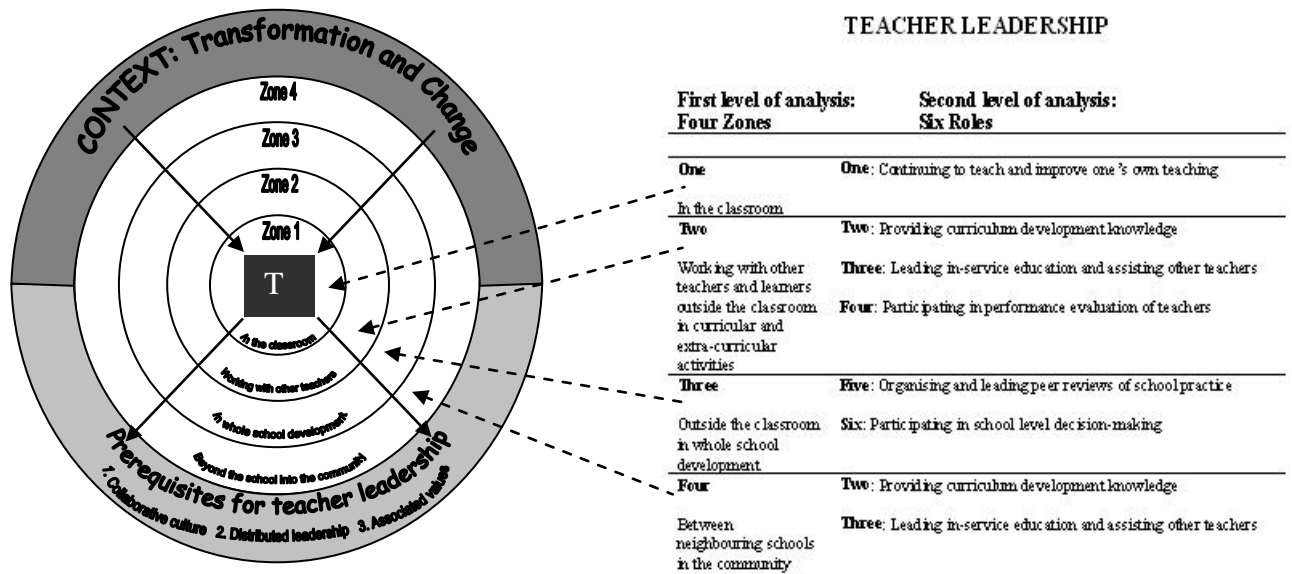


Fig 1: Towards a model of understanding of teacher leadership in South Africa by (Grant, 2008)

3.10 VALIDITY AND TRUSTWORTHINESS

Validity concerns whether a research instrument describes what it is supposed to describe (Yin 1984). Did the instrument actually measure the concept in question and did it measure the concept accurately? Cohen, *et al* explain how “In qualitative research validity might be achieved through the honesty, depth, richness and scope of data, the range of the participants approached, and the extent of triangulation” (2007, p.133). Lincoln and Guba (1985) develop the notion of trustworthiness as a key principle in qualitative research. Trustworthiness entails credibility and transferability, which is the extent to which the finding can be transferred to other contexts (Basse, 1999). However, as an interpretive researcher it is impossible to achieve absolute validity and trustworthiness in a subjective world where the aim is to ‘describe and not measure’ (Basse 1999 p.75). As researchers, we should be conscious of these issues and address them in our study. Validity should be seen as a matter of degree

rather than an absolute state (Lincoln and Guba, 1985). According to Winter (2000), trustworthiness of the study can be enhanced through prolonged engagement with the data sources, persistent observations, adequate checking of the raw data with their sources and triangulation of data.

As a researcher in my own school context, the issue of my positionality became critical, especially during the data collection and data analysis processes. In an attempt to reduce researcher bias and subjectivity, I adopted a multi-method approach for data collection. As already discussed, my data collection techniques include survey questionnaires, individual teacher leader interviews, focus group interviews, document analysis, observations and journal entries. By adopting a multi-method approach, I was able to achieve a rich description of how teacher leadership was enacted within the school context. The advantage of using multiple sources of evidence was the development of converging lines of inquiry, referred to as triangulation (Yin 1984). Triangulation is a process that “uses two or more methods of data collection in an attempt to fully explain the richness in complexity of human behaviour” (Cohen *et al*, 2007, p.141). Triangulation of data improved the degree of trustworthiness and validity of my study. I believe that triangulation helped to identify multiple realities of the participants. Considering that my research was located within the interpretive paradigm and my ontological assumption was that there are multiple realities of teacher leadership, I am confident that there was good alignment between my data collection processes, the research paradigm and the ontological assumption guiding the research study.

Individual case studies should “speak” for themselves rather than being interpreted, evaluated or judged by the researcher (Stake, 2005). In line with this thinking, I allowed the data to speak for itself by tape recording all interviews, making full and accurate transcripts of interview data, and avoiding selection of data. Through a rigorous data collection process, constant cross- checking and verification of data from different sources, I was able to enhance the trustworthiness of the data. The interview and questionnaire data combined into a coherent, relevant explanation and argument. Evidence from the focus group interview was used to corroborate evidence from the semi-structured interviews and to probe further the responses to the questionnaires. As a result, “a synergistic and co-coordinated chain of evidence was created thereby increasing the validity of the results” (Anderson and Asrenault, 1998, p.156).

3.11 ETHICAL ISSUES

According to Mouton (2001, p.38) “social research is not a value neutral activity. It involves people and therefore it raises questions about ethics”. Ethics can be defined as “a matter of principled sensitivity to the rights of others” (Cohen, *et al*, 2007, p.58). Case studies share an intense interest in personal views and experiences. Participants’ lives and expressions risk exposure and embarrassment. Researchers are guests in the private world of the participants (Cohen, *et al*, 2007). Therefore as a researcher, it was imperative that I followed the three basic ethical principles of autonomy, non-maleficence and beneficence (Stake, 2005). I needed to respect the autonomy of the participants, avoid speaking on their behalf and be accountable to the participants. Furthermore, my research study should do no harm to the participants, and not cause them any mental stress or trauma. Finally Stake (2005, p.447) argues that there should also be “some benefits either directly to the participants, or to other researchers and the community at large”.

In my study, different data collection techniques required different ethical considerations. Signed informed consent letters serve as a ‘moral obligation contract’ between the researcher and the participants (Stake, 2005, p.447). The consent letters that I gave to the participants outlined the exact nature and purpose of the research. The research aims and anticipated consequences were communicated to all participants so that they knew exactly what they were consenting to. I informed the participants that their participation was voluntary, and they could withdraw from the research at any time. They were reassured that their identities would be protected and disguised in the thesis. To this end, they were assigned aliases, thereby guaranteeing anonymity and confidentiality (Winter, 2000).

I believe that that the issue of power relations in research should also be an ethical consideration for the researcher. Therefore at no time did I use my position and power as a head of department to influence any decisions made by the participants. As I mentioned before, I was aware that participants might be intimidated by my perceived academic power and as a result, they might have been hesitant to express their personal views on the concept of teacher leadership. In this regard, I assured them that they were the ones with the power because they were going to be the ones contributing to the body of knowledge surrounding the concept of teacher leadership whereas I, as researcher, was merely the mediator of this process. Furthermore, I tried not to pressurise my participants in any way or coerce them into involving themselves in the research. Whenever I engaged in data collection techniques, it

was always at their convenience. For me the issue of ethics transcended the boundaries of ethical documents. Therefore, I am persuaded that ethical issues in interpretive research is more than the technical ethical forms that need to be filled, it was about social responsibility and personal integrity (Winter, 2000).

Ethical clearance for the research was granted by UKZN (see Appendix 12). My principal also granted me permission to conduct the research in my school and access to all school documents that were needed for the data analysis (Appendix 9). Throughout my research, I was also guided by the principle of professional ethics, which relates to “researchers membership of a profession” (Mouton, 2001, p. 239). Researchers make a commitment to search for the truth at all times in the research and have a moral obligation not to fabricate or falsify any information or misinterpret their findings in any way (Babbie and Mouton, 2001). On the other hand researchers’ must acknowledge all the data sources, indicate the limits of their study, report findings accurately and fully (Mouton, 2001). I am confident I observed all of the above principles associated with professional ethics.

3.12 Limitations of the study

Throughout the chapter, I have highlighted some of the limitations pertaining to the study itself. Limitations concerning the methodology, data collection instruments, and the data analysis process were discussed under these specific aspects of the study. In this section I discuss limitations that exist at a wider level of the study. One of the limitations of conducting the study in my own school was the issue of my own positionality as well as the power relations that might have existed between me as the researcher (HoD), and the participants (Post Level one educators). As a researcher, I acknowledged that whilst I could not eradicate this limitation I minimized the effects of this limitation by choosing participants who were not in my department so that there was no conflict of interest. Whenever I engaged in any data collection method, I always reiterated to the participants to view me as a researcher and not their working colleague. I always reassured them that whatever was said during the research process was confidential and for the purpose of the research only.

Secondly, I engaged in the process of reflexivity. Reflexivity is defined as a “self- conscious awareness of the effects that a researcher values, beliefs and attitudes can have on a study” (Cohen, *et al*, 2007, p.171). Throughout the study, I engaged in disciplined self-reflection. I was constantly aware of my own values assumptions and beliefs at all times throughout the

research process. I made explicit to the readers how I gathered the data and how I viewed the evidence emanating from the data. Case studies are prone to researcher bias and subjectivity (Cohen, *et al*, 2007). I acknowledge that as an interpretive researcher, I could not be completely unbiased, but I attempted to reduce bias by representing subjects, context and the data accurately. Furthermore, my multi–method approach allowed me to engage in the processes of, triangulation, respondent validation and reflexivity to reduce subjectivity and increase validity. Triangulation was used “to counter misinterpretations, clarify meaning and verify observations and interpretations” (Stake, 2005, p.443). Similarly Cohen, *et al*, explain, “Respondent validation allowed respondents to verify data to ensure that the researcher’s personal bias has not influenced the interpretation of the data” (2007, p. 145).

Another limitation of case study methodology is that the results cannot be generalized. As an interpretive researcher, I understood that in case study research the degree of external validity might be low. External validity is concerned with the extent that the findings may be generalised to other contexts (Yin, 1984). According to Stake, the purpose of a case study is not to generalise. He writes, “The real business of case study is particularization not generalizations” (1995, p.8). My intention was not to generalise but rather to get a thick description of how teacher leadership was enacted in a particular context and time. A further limitation of my study was the theoretical framework. The distributed leadership theory that informed my study has been formulated based on empirical research conducted in the western world and not in Africa. Therefore, the interpretations of my results considered this limitation.

3.12 CONCLUSION

This chapter has reviewed the case study methodology used in this study. Data collection instruments were interrogated to reveal their implementation procedures, their strengths and weaknesses. Different types of data were collected therefore different kinds of analytical tools had to be used. Data were analysed both quantitatively and qualitatively using the SPSS programme and thematic content analysis respectively. Whilst the data from the interviews and the reflective journals were analysed in depth, the data from the observational schedules and document analysis were analysed at a more descriptive level. My data collection process followed a sequential pattern. This was largely because the many data collection instruments informed one another. By using case study methodology, I was able to gather a rich and in-depth description of both distributed leadership and teacher leadership practices in the case study school. However, I do acknowledge that findings from the study cannot be replicated or

transferred to another context and therefore generalisations of the findings cannot be made. Whilst interpretive case study cannot escape the elements of subjectivity and researcher's bias, it can still claim to be valid and trustworthy. In this study, I employed the processes of triangulation, respondent validation and reflexivity to improve the degree of validity and trustworthiness. I made a conscious decision to conduct my research with moral integrity and therefore addressing ethical issues was a high priority in the research study. I must concede however that as a novice researcher, much of my research was conducted through trial and error.

CHAPTER FOUR

PRESENTATION AND DISCUSSION OF THE FINDINGS

4.1 INTRODUCTION

In this chapter I present the findings that emerged from the data collected using the various research instruments. Data from the school observation schedule, the teacher leadership observation schedule, individual teacher leader interviews, the focus group interview, journal entries and document were analysed using thematic content analysis. The survey questionnaires were analysed quantitatively using descriptive statistics such as frequencies and percentages from the SPSS system as well as qualitatively using content analysis.

The textual data were further analysed using Grant's (2008) zones and roles model of Teacher Leadership which I hereafter refer to as the model. Data were interpreted through a distributed leadership lens and, in particular, Spillane's (2006) 'leader-plus' perspective and Gunter's (2005) characterizations of distributed leadership as 'authorised, dispersed and democratic'. This theoretical framing was discussed in detail in *Chapter Two*.

I begin *Chapter Four* by describing the work and the persona of each of the three teacher leaders and I allocated them pseudonyms to protect their identity. My description of each teacher leader focuses on their core leadership roles that they exhibited in the four zones as outlined in the model. I attempt to sketch a picture of how these three teacher leaders performed their leadership roles and, in doing so; I reveal how teacher leadership was enacted in the case study school. Finally I locate these three teacher leaders within the larger school context to determine the factors that enhanced or hindered their enactment of teacher leadership. The following grid lends clarity to the identification and labeling of data contained in this chapter.

Table One : Table showing identification and labeling of data.

| DATA COLLECTION INSTRUMENTS | LABEL CODE | DATE OF DATA COLLECTION |
|--------------------------------------|-------------------|---------------------------------|
| Teacher survey questionnaires | TSQ | 28 August 2008 |
| SMT survey questionnaires | SSQ | 28 August 2008 |
| Self –Reflective Journal | J | October 2008- March 2009 |
| Focus group interview | FGI | 12 November 2008 |
| Informal observation | IOB | October 2008 -April 2009 |
| Individual interviews | II | February 2009 |
| Document analysis | DOCS | 2007-2009 |

4.2 THE RIPPLE EFFECT ‘ANALOGY’

I begin this chapter by presenting an analogy that I believe illuminated the enactment of teacher leadership in this particular study. I use the analogy of the ‘Ripple Effect’ to describe the enactment of teacher leadership. Being a natural science teacher, I am quite au-fait with the dynamics surrounding the ripple effect movement. Here I simply refer to the ripple effect movement as “the repercussions of an event or situations experienced far beyond its immediate location” (Collins, 2004, p.1295). Consider the following, when you throw a stone in the water, that little stone has the potential to set up larger wave movements in the huge body of water. The waves in the ripple effect start increasing in size as it moves away from the point of entry. When the stone enters the water, it submerges and sets up the ripples. These ripples firstly change the physical appearance of the water and secondly these ripples might set up invisible underwater currents.

Furthermore, in the ripple effect movement, the larger the weight of the stone, the greater the amount of ripple waves that are set up. When there are rocks in the body of water, the ripple effect is affected. When a wave in a ripple effect hits a rock, it sometimes moves around the rock. However when the rocks are extremely large the ripple wave hits against the rock and dissociates or it rebounds to the preceding ripple wave. Metaphorically speaking, that little stone can be described as the level one teacher leader. The ripples that are set up can be compared to leadership roles in the four zones of the model. The school as an organization could be described as this huge body of water. The weight of the stone can be compared to the enhancing factors of teacher leadership whilst the rocks in the water can be compared to the barriers to teacher leadership development. Having introduced the ripple effect analogy that I believe aptly describes the enactment of teacher leadership by the three teacher leaders in my study; I shall use this analogy throughout the chapter in the presentation of my findings. I now turn my focus to the three teacher leaders and present their enactment of teacher leadership in response to my first research question. I begin with Mary and thereafter proceed to Jen and Jane respectively.

4.3 THE ENACTMENT OF LEADERSHIP BY MARY, THE CURRICULUM DEVELOPER

4.3.1 A description of Mary

At the time of the study Mary, a 34 year-old female, was married with three children and had 13 years of teaching experience. These 13 years of experience were acquired in the case study school. Her qualifications included a Bachelor of Commerce degree and a Higher Diploma in Education. She taught Accounting in grades 10 to 12 and Business Studies in grade 12. Her understanding of a teacher leader was: *“a teacher who takes on a leadership role that is either delegated by management or voluntarily, takes it upon oneself to head a committee. Teacher leaders display vision and humility, and overcome obstacles”* (Mary, J, p.3). Most of the data collected seemed to indicate that Mary was engaged in leadership roles across all four zones described in the model.

4.3.2 The expert practitioner in the zone of the classroom

Mary’s classroom practice revealed her mastery in the commerce field. I had a glimpse of her expertise during my classroom observation visit. *“She is creative and innovative with teaching strategies and the resources used in her lesson”* (IOB, p.1). Through her teaching she inspired and motivated learners to achieve a standard of excellence in their work. Her IQMS report confirmed this: *“different assessment activities are employed by the educator to cater for multiple intelligences and learning styles. Assessment informs multiple intervention strategies to address specific needs of all learners and motivates them”* (IQMS REPORT, 2008, p.3). She maintained *“excellent classroom discipline”* (IOB, p.1) and had a meaningful relationship with learners. This description of Mary was also reiterated in her IQMS report: *“The educator creates a positive learning environment that enables all learners to be productively engaged in individual and cooperative learning. Learners are motivated and self disciplined”* (DOCS IQMS REPORT, 2008, p.1). Mary exhibited a high degree of pastoral care for her students. This was evident when I visited Mary in her classroom and observed one of her lessons. Her summative (IQMS) scores and report confirmed my perception and evaluation of Mary’s classroom practice, which read: *“The educator uses inclusive strategies and promotes respect for individuality and diversity”* (DOCS IQMS REPORT, 2008, p.1). Mary scored 51 out of a maximum 54 for the first four criteria in her IQMS evaluation. These first four criteria are largely concerned with classroom practice. The data seemed to confirm that, Mary was first and foremost a leader in the classroom (zone one).

The notion of the expert practitioner raises some important concerns for me. According to Harris and Lambert (2003,p.43), “teacher leaders are in the first place, expert teachers who spend majority of their time in the classroom but take on leadership roles at times when development and innovation is needed”. How do Harris and Lambert (2003) quantify the concept of “expert” in their definition of teacher leadership? I am of the view that teacher leaders can be experts based on their qualifications, based on their experience or due to a combination of both their qualifications and experience gained on the job. I believe that there are different levels of expertise. However considering the notion of life long learning, I argue that the concept of expertise can be infinite.

My observations of Mary revealed that her teaching and assessment strategies illustrated expert practice. I believe that her expert practice was due to her years of experience and her expert knowledge of her subject. My perception was confirmed by Mary’s IQMS supervisor: *“The educator uses knowledge to diagnose learner’s strengths and weaknesses in order to develop teaching strategies. Learner –centered techniques are used to promote critical thinking. The report further attests to Mary’s expert knowledge concerning assessment strategies: “The educator’s feedback on assessment activities is insightful, regular and built into the lesson design. Assessment activities and provide insight into individual learner’s progress” (DOCS IQMS REPORT, 2008, p.2).*

The above evidence also revealed that Mary was a reflective practitioner and engaged in action research at a classroom level (zone one). Day and Harris argue that:

Being a reflective practitioner involves a commitment to and development of critical inquiry into the moral, ethical, and political issues embedded in the teacher leader’s thinking and practice, on processes of decision making and on the students they teach (2002, p. 968).

Most of these reflective practices were usually initiated to improve teaching and learning in the classroom. Through the process of reflection, teacher leaders exercise responsibility and accountability for the decisions they make in their teaching (Day and Harris, 2002). Mary claimed that her many years of teaching experience had improved her knowledge and skills and this had helped her to adapt when she was faced with the challenge of a change in the

curriculum content. She qualified this when she said :“*When there where changes in the accounting learning area. I was able to meet these challenges. I think it is because of my number of years of experience in this subject*” (Mary II, p.7). In Mary’s case, it seemed that teacher leadership was enhanced by the number of years of teaching experience.

4.3.3 The curriculum developer and mentor in zone two

In 2007, when the Commerce Head of Department retired Mary was asked by the principal to take on the leadership role of Subject Head of Accounting. Minutes of a staff meeting held on 14 August 2007 attests to such a decision being taken: “*I have asked Mary to head the commerce department. Are there any objections to this?*” (DOCS, p.89). However, during a post provisioning staff meeting held later in the year on 17 November 2007, it was established that the school did not need a Head of Department in the commerce field but rather a Head of Department in the Technology field. This meant that for Mary, the prospects of an internal promotion were over. This unfortunate chain of events did not affect the manner in which she executed her role as the subject head for commerce. She enacted the role with the same gusto and momentum as before. She qualified this perception:

I was acting head of my subject, did it for no remuneration, but did it because for the smooth running of the school and to let my subject grow and at the same time keeping the interest of the learners, they are important to me. I wanted to get the experience but at the same time get some recognition as well (Mary, II, p. 2).

The data led me to believe that Mary was a curriculum developer (zone two, role two). Most of her curriculum development initiatives were joint adventures primarily, between herself and other teachers in her department though, at times, she did involve educators from other departments as well. As a subject head, she initiated and led all subject committee meetings. Her approach in curriculum development initiatives was innovative and pragmatic. One of her visions as a subject head was to contextualize the EMS curriculum for her own particular school context. She qualified this when she said:

advising educators under me to bring in a lot of Accounting into EMS how to get Accounting into the EMS curriculum because only 3 periods are allocated for EMS.

So bringing in Business Economics and more accounting in grade 8 and 9 EMS because, learners tend to have a problem with accounting at Grade 10 levels (Mary, II, p.3).

The above quote also illuminated the mentoring role of this teacher leader. Mary was a mentor to new teachers; she worked with other teachers, led in-service education and gave assistance on curriculum related issues to other colleagues within the school. This was an example of teacher leadership in zone two, role three of the model. Mentoring focused on equipping teachers with skills and the knowledge. Mary explained:

I monitor educator's performance with regard to curriculum completion and their pacesetters. Together we formulate the programme of assessment for Accounting and Business studies in all grades. I get the teachers who are teaching a specific grade to sit together and work on their programme of work at the beginning of the year. Then we all sit as a bigger team and discuss what we are doing across the grades (Mary, J, p, 7).

Although Mary's formal leadership role as the subject head was delegated to her, it also gave her the opportunity and the avenue to develop informal emergent leadership initiatives. The above quote is an example of one such initiative. Mary believed that building confidence in other teachers was central to her mentoring role. She explains: *"I advise my educators and develop them to build their confidence so that they can try their best to learn these changes and bring it to our learners in what ever way it would be easier for them to learn"* (Mary II p.7).

In her capacity as subject head, Mary participated in performance evaluation of the educators in her department. This was an example of leadership in zone two, role four. Mary was a member of the Developmental Support Group (DSG), which was a structural body that formally evaluated educators for IQMS purposes. Apart from this formal evaluation, she also engaged in informal peer assessment evaluation. She wrote in her journal: *".... with the new teachers coming into the department, you have to be constantly watching over them and making sure they are doing the right thing"* (Mary, J, p. 9). These informal evaluation sessions had a diagnostic purpose which was largely aimed at improving teaching and learning as Mary describes: *"If a teacher is having a problem with teaching a section, we try to identify*

what the problem is, we come up with plan and then put that plan into action and then we evaluate the result and monitor the progress of the educator” (Mary, J, p.9). I argue that Mary is reflective practice skills in the classroom (zone one) facilitated her success as a reflective practitioner beyond the classroom (zone two). Therefore, I believe that the zones in the model are inter-related.

4.3.4 Leading in whole school development

At a whole school level, Mary held the portfolio of the school internal auditor, prefect mistress and internal examination officer. These three roles, I argue, were examples of Mary participating in school level decision-making (role six). The internal auditor and internal examination officer roles were both delegated by the principal. Her role as the school internal auditor led to her becoming the treasurer of the school finance committee. She was also involved in formulating the school financial policy as well as drawing up the school budget. Mary believed that she was chosen for this role because of her accounting skills and expertise. She qualified this: *“When a head of an institution delegates something to you, you accept it and go out there and try your best. You want that recognition. I feel it’s a honour to do something in a leadership role. It gave me a chance to display my accounting skills” (Mary II, p .6).* Although she was a post level one educator, Mary sat in on all management meetings. This I believe was largely due to the delegated formal leadership roles that she took on.

Mary was also the prefect mistress in the school. She was nominated for this leadership role at a staff meeting, by the majority of the educators. Minutes of the staff meeting held on 19 January 2009 documented the following words said by the principal, *“the staff has unanimously decided that Mary will be the prefect mistress for 2009” (DOCS, p.132).* Mary was responsible for the formulation of criteria for prefect selection in consultation with the staff and the Representative Council for Learners (RCL) body. She had to monitor and evaluate the performance of the prefects on a continual basis. Mary attributed her success in both the above roles to her years of experience. She believed that this experience had given her an in depth insight into how the school operated. Mary qualified this view: *“I have been so long in this school. I know the learners who should be prefects. Also when I am planning the budget I, know what to prioritize because I know what was happening in the previous years” (Mary II, p .7).* I argue that teacher leadership was enhanced because this educator had a thorough knowledge of the context in which she led. This allowed the teacher leader to

make a more informed organizational diagnosis during the change process or when she led any initiative at school level.

Minutes of a staff meeting held on the 6th of October 2008 documented the principal's decision to delegate the leadership role of internal examination officer to Mary and two other members of the SMT. The minutes read as follows: "*Seeing that Mary is a matric teacher, I have asked Mary to assist my two HODs in the control of the final exam. Are there any objections to this decision? (Principal, DOCs, p.122).*" Together with the SMT, Mary prepared the exam rooms, compiled class registers and seating plans for learners. She was also responsible for the control of the exam papers as well as their dispatch and collection. However, I am of the view that the above role was more aligned to management activities than it was to leadership because the emphasis was on getting systems to operate effectively (Clark, 2007). Therefore, I argue that not only was Mary a visionary but she was also a good systems person. Minutes of a staff meeting held on 28th November 2008 documented the principal's acknowledgement of Mary's outstanding execution of her duties as an examination officer. The minutes read as follows: "*I would like to thank Mary for the hard work she put in during the examination and for her commitment in running successful exams*" (Principal, DOCs, p.129). Mary's exemplary execution of her role as an internal examiner officer earned her the position again the following year. The 2009 Year Plan document attests to such a decision being taken by the SMT. Minutes of a staff meeting held on the 19th of January documented the SMT support for Mary in this role: "*My management and I have asked Mary to assist us again, with the internal examination*" (Principal, DOC, p. 133).

For taking on these various delegated leadership roles, Mary received incentives in the form of her teaching load being reduced by five teaching periods. This gave Mary more time in school to execute her duties pertaining to the leadership roles delegated to her by the principal. Mary's motivation for taking up delegated leadership roles stemmed from her personal desire to gain leadership experience, and to attain recognition. The following quote attests to this perception: "*I did it to get the experience but at the same time get some recognition as well*" (Mary II p.2).

In light of the above discussion, the data led me to believe that Mary was bombarded with formal delegated leadership roles. Mary seemed to be experiencing 'leadership overload'. With the lack of time acting as a major barrier, Mary sacrificed self- initiated emergent

teacher leadership roles for delegated leadership roles, because she did not want to fall into disfavour with the principal. Mary endorsed this view: *“sometimes you consider your workload, can you cope with this. When you are delegated a duty, its something you have to do, so you accept it. To initiate something you’ve got to weigh your situation, where are you at, Can I cope with this?”* (Mary II, p.6.). I believe that the lesson for principals is that when delegating formal leadership roles, the leadership should be dispersed through the organization, which will create an environment in which all educators are given an opportunity to lead, while at the same time no one educator becomes burdened with too many leadership roles (Katzenmeyer and Moller, 2001).

While most of the leadership roles that Mary had taken on were supported by the principal, primarily because he had delegated them to her, there was one leadership role that was not supported by the principal .This was as the chief coordinator for the matriculation farewell. The following quote attests to such a leadership role existing: *“Learners approach me to organize the farewell for them because I was their matric form teacher and also, because I am sociable and approachable”* (J, p.5). Matriculation farewell dances were not supported by the principal, because of the learners’ behavioral problems. Mary claimed that this emergent leadership role was one of the most memorable initiatives she had undertaken. This leadership role forced her to challenge the status quo because she defied the wishes of the principal. Using the theoretical lens of Gunter’s (2005) characterizations of distributed leadership, I argue that this leadership role was an example of democratic distributed leadership. Mary believed that that this defiance was worth it because it was done in the interest of the learners: *“My principal was negative because he is totally against parties and farewells because sometimes some learners become intoxicated. What about the other learners, why should they be deprived of a farewell”* (J, p.5). The principal’s lack of support for Mary in taking up this leadership role was summed up in this quote: *“He always has to second guess your decisions. He did not attend the function although most teachers and all the members of the SGB attended the matric farewell”* (Mary J, p.5). In relation to the same event, Mary wrote: *“I worked on the venue, catering, invitations, décor, music and the security. Planning and organizing this function was difficult because the school played a very small role. I got an opportunity to work closely with my learner’s parents who assisted me”* (Mary, J, p.4).

Mary believed that attaining success in one leadership role, gave her the confidence to take up other leadership roles in the school. She qualified this: *“Even getting together and sorting out a staff function or social event, I was able to do that because I was confident and I had got the experience from doing the matric farewell”* (Mary II, p.1). Mary also believed that she achieved success in this leadership role because she invited collaboration and teamwork, as the following quotation suggests: *“I was able to do a matric farewell, something that I have never done before, but working with a few colleagues on the staff and learners, we were able to pull it off”* (Mary II, p.1). The above quote also highlights teamwork and collaboration as important prerequisites for teacher leadership. Like the ripple that hits a rock and slowly moves around it, I argue that when Mary encountered the principal as a barrier to her leadership, she strategically maneuvered around this barrier by enlisting the help of the parents and the SGB members. In this way, she gained their support and, in doing so, she legitimized her leadership role in the school.

4.3.5 Leading across schools and into the community

Mary exhibited teacher leadership in zone four of the model when she operated as the cluster coordinator for accounting in the circuit. This leadership role gave her the opportunity to create other informal leadership roles such as curriculum developer, mentor and community developer. She wrote in her journal: *“As a cluster coordinator, I liaise with educators in my circuit on the current issues related to my field of study and the curriculum. I network across schools in the community”* (Mary, J, p.15). This quote suggests that Mary led in-service education and assisted educators across the schools in the community and provided curriculum development knowledge to them (zone four, role two). Mary endorsed this view: *“as a group, we look at individual problems that educators have and try to assist them, to overcome the problems, by giving them a case study, and how to approach it”* (Mary, II, p.3).

Mary also made mention of the initiative she led in the community: *“As a cluster group we decided to help the learners in the community. Last year (2008), I gave accounting tuitions in a rural school in the community, to Grade 12 learners who had failed in 2007”* (Mary, J, p.15). Therefore I argue that Mary’s leadership role in the community was not only limited to her interactions with teachers but it included learners as well. Mary did not only rely on the formal cluster meeting to liaise with her colleagues from the neighbouring schools but engaged in peer coaching over the telephone as well. The following quote attest to the

relationship that Mary has with her cluster educators: *“I keep in touch with the other educators in my cluster group by sending them sms about assessments and curriculum issues in accounting and business studies” (Mary II, p.7).*

Mary was initially nominated to take on the leadership role of cluster coordinator in 2007. However, in 2009 she was not re-elected as the chairperson. With much dejection Mary explains: *“The first year I was nominated and I accepted the role, because these were young teachers coming in and I felt that I knew what was happening so let me take on the role .I was a cluster chairperson for quiet a few years, now I am just a secretary” (Mary, II, p.3).* The majority of educators chose the new cluster chairperson democratically. In Mary’s case, it seemed that a democratic process prevented her from taken up this leadership role. Mary believed that the knowledge and skills she gained as the cluster coordinator (zone four) assisted her in enacting her leadership role as a subject head (zone two). Mary qualified this: *“I attend workshops in my district and cluster and I have a close relationship with my subject advisor in my area but I also liaise with the subject advisor in the Durban region. My role as a cluster coordinator has allowed me to give better advice to my teachers in my department” (Mary II p.7).* I argue that this further developed her expertise as a classroom teacher (zone one). This supports my earlier claim that the four zones in the model are inter-related and that attaining confidence in one leadership zone encourages the teacher leader to take up leadership roles in other zones. In other words, the repercussions of one leadership role were experienced far beyond its immediate location. Therefore, I argue that the ripple effect is an appropriate analogy to describe the enactment of teacher leadership in this particular case.

The data also led me to believe that Mary prioritized her leadership roles in order to strategically overcome the barrier of leadership overload. Although she executed all her leadership roles with efficiency, she only made personal sacrifices for the leadership roles she felt passionate about. When I brought this to her attention in the individual interview, she said:

Some of the leadership roles are more important than the others. It depends on whether these leadership roles are going to ... to have an effect on the teaching and learning in the school. If that leadership role and the way I perform, it is going to affect the academic performance of my learners in any way. Then I will go all out. The other roles that do not have a direct impact on my learner become secondary (Mary II, p.6).

I argue that the above quote alluded to the fact that Mary, the expert teacher, prioritized leadership for teaching and learning purposes. Having concluded my discussion on the enactment of teacher leadership by Mary, I now move on to discuss the enactment of teacher leadership by Jen.

4.4 THE ENACTMENT OF TEACHER LEADERSHIP BY JEN, THE UNDERQUALIFIED TRANSFORMATIVE LEADER

4.4.1 Description of Jen

At the time of the study, Jen was 28 years old with six years of teaching experience. She taught English to grade 11 learners. She was married and had one child. Jen was employed as a governing body educator. Her conceptualisation of leadership epitomised the concept of distributed leadership practice:

To lead is to acknowledge others who you may encounter, learning from them and teaching them. A leader tries to develop the leaders in other people. Leadership is about listening, listening to people's ideas and taking all of this listening and putting it into practice. I think anyone in an organization can be a leader, even if they are at the bottom of the ladder (Jen, FGI, p.1).

This view was also supported by observational data: “*Jen appeared to be highly creative and innovative person who had a charming, charismatic and energetic disposition*” (IOB, p.3). Jen had exceptional motivation skills and was a constant source of inspiration for educators who were generally highly frustrated with their work. Her philosophy in life was: “*It is better to have tried and failed than fail to try*” (Jen, II, p.2). She had an excellent work ethic that was characterised by integrity, transparency and fairness. Jen led by example and her success in her leadership roles was attributed to her strong sense of accountability and reliability. Jen was studying towards her Bachelor of Education degree (Bed) through UNISA and had completed two years of her studies. She believed that she was the classic all rounder who was multitasked and multi-skilled: “*throw anything at me and I will do my best to solve it, I am knowledgeable about many things, socially, physically and spiritually I keep abreast with regards to all of this*” (Jen, J, p.12). When I compare Jen to the stone in my ripple effect analogy, I argue that in Jen's case the stone would weigh a lot. The weight of the stone would be the sum of Jen's knowledge, experiences and, most importantly, her leadership skills.

Therefore like the heavy stone that would set up many ripples in the body of water, I believe that Jen's experiences, knowledge and her leadership skills allowed her to engage in leadership roles across all four zones in the model. In the next part of this section, I focus on the various leadership roles that Jen engaged in, within the school and beyond the school into the community.

4.4.2 Teacher leadership for transformation and change

Jen strongly believed that teacher leaders are change agents and her view of teacher leadership was closely linked to that of Crowther (2002). Crowther (2002 p.xvii) argues that "teacher leadership is about action that transform teaching and learning in the school, that ties school and communities together on behalf of learning, and that advances social sustainability and quality of life for a community". This view of teacher leadership resonates with Shield's (2004) description of transformative teacher leaders. Shield (2004, p.109) argues that "transformative teacher leaders challenge existing beliefs and practices, and grounds educational leadership in some criteria for social justice". I argue that Jen's understanding of teacher leadership fell within the democratic distributed leadership framework and the following quote supports my argument: *"For me teacher leadership is about creating together with others a new future that will encapsulate the new beginnings we all dream about, moving from the old pattern of thinking to the new. Teacher leadership is about owning the picture of the new way that others buy into the process"* (Jen II, p.1).

Evidence emerging from the data seemed to suggest that Jen's perception of teacher leadership was in accord with her enactment of teacher leadership. Through her enactment of her leadership roles, Jen promoted social justice issues as an emancipatory leader. Jen believed that teachers through their leadership practice make a call for action and change. She justified this: *"People are always caught in a rut; we don't tend to use the new pattern of thinking. We always want to do it the way things were always being done. Therefore, I believe we should now just take up arms and move forward. It is no use leaving change behind. We should give change a chance"* (Jen, II, p.2). This is in line with the view of Harris who argues that , "Contemporary leaders are effective agents of change" (2003, p.13). Similarly, Morrison describes how "education and change are inescapable" (1998, p .3). Jen was driving the force of change in the school. Despite being an under-qualified teacher, she was instrumental in re-culturing the school environment in which new and expansive patterns of thinking were been

nurtured. For example later on in this chapter you will learn how Jen used a religious forum to address a social issue like drug abuse in school. Through her leadership roles, Jen created “an environment where people tap into their talents and commit their skills and knowledge to a common course of action” (Moloi, 2002, p.2). Therefore I believe that Jen’s enactment of teacher leadership fell within Gunter’s (2005) democratic distributed leadership characterisation.

4.4.3 Leading in the zone of the classroom

Data collected from the IQMS documents as well as observational data led me to conclude that Jen was a leader in her classroom (zone one). Like Mary, Jen she was able to improvise with resources and designed learning programmes that were appropriate for the learners. Her IQMS supervisor noted: “*Jen’s lessons are structured and clearly presented. A wide variety of assessment techniques are used, allowing learners to demonstrate their skills and knowledge*” (DOC IQMS, p.4). Jen was able to maintain discipline in her classroom in an unthreatening manner and had a meaningful relationship with her learners. She explained: “*I think teacher leadership begins in the classroom, where the teacher is confident and works with the learners encouraging them, and teaching them with passion*” (Jen, II, p.2). My observations were further supported by Jen’s IQMS report which described her as an educator: “*who creates and organizes a suitable learning environment in which all learners are engaged in appropriate activities The learners are disciplined and the learning environment is free of discrimination*” (DOC IQMS, p.2). Implicit in the IQMS report was the notion that Jen’s behavior as a leader in the classroom had a social justice element to it. Astin and Astin (2000, p.11), argue that transformative teacher leaders “encourage respect for differences and diversity”. This again augments my argument that Jen was indeed a transformative teacher leader because she created a learning environment that was free of discrimination.

From my observations of Jen during the two terms, it became clear that Jen displayed a great deal of pastoral care for her learners. My observations were supported by Jen: “*I know my learners on a one to one basis. I have developed a relationship with them. I empathise with them when things go wrong and I praise them when things go right*” (Jen FGI, p.3). Jen was a constant source of motivation and inspiration for her learners in the classroom and that attitude had transcended to the staff as well. The following quote expressed Jen’s feeling about teacher leadership: “*I think in that way a teacher leader is becoming a role model and setting a good example for learners’ .I am always inspiring, encouraging and motivating*

learners and educators” (Jen, II, p.2). Despite the positive comments made about Jen’s work in the IQMS report, her IQMS scores for the first four performance standards were low because she attained a score of 36 out of 54. I believe her scores were not a true reflection of her classroom practice and were probably influenced by a larger school practice that perpetuated the perception that under -qualified teachers should not be given high scores in their IQMS reports. In contrast to the implications of the low IQMS scores, Jen showed evidence of reflective classroom practices which were centered on improving teaching and learning: *“Jen began the lesson by reflecting on the previous day’s lesson. She spoke to the learners about time management, which seemed to be a problem in the previous lesson” (IOB, p.6).* Jen confirmed: *“At the end of a lesson I always reflect on the lesson. What was good about it and what was bad, I sometimes change my method of teaching and I do the lesson again to see if the learners’ performance increases” (Jen, II, p.2).* These action research plans were mostly self- initiated, emergent and illustrated an example of leadership in zone one, role one.

4.4.4 Leading as a mentor within the school (zone two)

Jens’ leadership roles in zone two were largely restricted to informal leadership roles while formal leadership roles were the domain of the HoD. The data led me to conclude that Jen felt threatened by her HoD because of her employment status: *“I feel subjected to those above me. I feel I don’t want to overstep or overplay my part or my role as an educator, I feel I have to step in line with the way things are done in my school and in my community” (Jen FGI, p.3).* Jen was cautious in that she never wanted to challenge her HoD on any curriculum issues and believed that if she challenged the HoD her employment could be jeopardized. When Jen assisted other teachers in the English department, it was because she was mandated to do so. However the lack of formal leadership roles within zone two did not prevent Jen from forging close relationships or building a rapport with other teachers through which mutual learning took place. Her role as a mentor to new educators (role three) was largely on an informal basis. Jen led informal in- service training in curricular and extracurricular activities for new and inexperienced teachers. Her mentoring role involved: *“ working with other teachers and those who were new who came in, encouraging them and giving assistance where needed,” (Jen II, p.2).* Through this mentoring role, Jen was able to build skills and confidence in other teachers. During peer- coaching sessions, Jen was always cautious and conscientious of her employment status in the school because even after she gave comprehensive guidance to the new educators, Jen always said something like *“please verify this with the HoD before you do*

it” (IOB, p.5). This perception was corroborated by Jen during the focus group interview, she lamented,

Okay, I feel sort of entrapped. I feel I want to explode or burst into a new dimension, however I feel trapped like in a cocoon and I think I feel this way because I have reached and attaining being a teacher leader in my classroom. I need to go to another level, wanting to experience something new and different and wanting to be given the opportunity to do something else for the betterment of others (Jen, FGI, p.3).

The above quote suggested that Jen’s leadership practices in zone two were been suppressed by the school culture and the HoD in particular. It also illuminated how teacher leadership roles were progressive, moving from one zone to the next zone. Jen suggested that since she had attained a level of leadership in the classroom (zone one) she felt that she was ready to lead in the next level that was zone two. In other words, Jen perceived the enactment of teacher leadership roles to be similar to the ‘ripple effect’ analogy. With regard to extracurricular activities, Jen held the leadership position of housemistress and she coordinated and led all sporting activities for that particular sporting house. She qualified this: *“Last year during the athletics period of training, I worked with all teachers for the sport. I did the warm up exercises and showed them (other teachers and learners how it is done by going on the floor and demonstrating” (Jen, J, p.18).* The above quote illustrated that Jen was a role model to the educators in her group because she led by example. It also demonstrated the passion with which this teacher leader executed this self- initiated leadership role.

4.4.5 Leading at a whole school level (zone three)

Jen’s leadership roles at a broader school level (zone three) were both delegated leadership roles as well as self- initiated emergent roles. Jen was delegated the role of the staff secretary by the principal. However while Jen perceived her role as a staff secretary as one of leadership; I argue that it was more aligned to an administrative role. The self initiated emergent leadership role that Jen created for herself was that of the staff event coordinator. Jen was always interested in building cordial relations amongst educators in the school and she believed that social events would be a way of bringing the staff together. She was hopeful that the cordial relations fostered during these social gathering would spin off into the working relationships as well. The following quote attests to this: *“I want the staff to be one big happy family. We must all work together as a team and forget our past problems so that*

we can move forward. Having staff functions is one way of bringing the staff together” (FGI, p.7). The data suggested that Jen was re- culturing the school environment so that it resembled a professional learning community as described by Katzenmeyer and Moller (2001).

The second of Jen’s emergent leadership role in zone three was when she initiated discussions for the development of the school religious policy. She led her team in the development of a very comprehensive school religious policy: *“The staff knows that I can lead. I led them, when we had to come up with a religious policy. I was instrumental in drawing up the school religious policy” (FGI, p.8).* Jen believed that her success in this initiative was attributed to her work ethic. In line with the thinking of Katzenmeyer and Moller (2001), I believe that Jen was able to influence her colleagues due to the creditability that she earned in her past actions. In Jen’s case she had a reputation for being accountable and responsible. Jen’s leadership role in the religious policy initiative, gave rise to another leadership role which arose when Jen decided to lead religious service meetings for Christian learners in school every Fridays, during breaks: *“I, conduct religious service once a week in the school” (Jen II, p.2).* This initiative was supported by both the SMT and the principal: *“It did not bother them that I was not qualified. They know my ability; they know I can get the job done” (FGI, p.8).* Sacrificing her lunch breaks might have been an indication of Jen’s passionate for that particular initiative. She used these meetings as a forum to invite community leaders and religious leaders to come to school and give learners motivational talks on drug and alcohol abuse. She confirmed this *“I get the local church leaders to come to school and motivate our learners” (Jen, II, p.2).* This leadership role was an example of leadership in role six because it was linked to whole school decision -making. Furthermore I argue that this initiative was the enactment of authentic teacher leadership because it was altruistic in nature. Jen had made personal sacrifices for the betterment of the learners and the school and community at large. In the next section I focus on Jen’s leadership role in the community (zone four).

4.4.6 Leading in the community (zone four)

Jen leadership role in the community was restricted by her employment status.

Although Jen did not have any formal leadership role at a cluster level with regards to curriculum development (zone four, role two), she did get involved in interschool networking. Together with teachers from other schools, she set up supportive structures to discuss learning area matters as the following quote attests: *“I liaise with teachers from other schools and we share material pertaining to our learning area” (Jen II, p.4).* Jen believed that opportunities,

for attaining a formal leadership role at cluster level were restricted by virtue of the fact that she was considered to be under qualified and because of her governing body status: *“When they hear that you are governing body employed they don’t want to nominate you because they are not sure if you will have a job next year. They want someone who is stable.”* (Jen, J, p.10).

Paradoxically while Jen’s status as a governing body educator hindered her teacher leadership roles in some zones, it had also enhanced her role as a teacher leader in other zones. The data suggests that Jen was always trying to prove her worth in the school by initiating new projects that were aimed at making a meaningful contribution to the school. Could it be that her lack of job security was driving Jen’s intrinsic motivation to constantly prove her worth by taking on delegated leadership roles? In summary I argue that Jen enacted emergent teacher leader roles which laid the foundation to challenge the social injustices in the school. This I believe was an example of transformative leadership within a democratic distributive leadership practice. Jen was an example of a democratic distributed leader who laid the ground work for challenging social inequities and inequalities (Shield, 2004). I move on now to present the enactment of leadership by Jane, the final teacher leader in the case study.

4.5 THE ENACTMENT OF LEADERSHIP BY JANE, THE HUMANITARIAN

4.5.1 A Description of Jane

Jane, a 25 year old female, had been teaching for three years at the case study school as an unprotected temporary educator (UTE). She had a degree in information technology but she did not possess a teaching qualification. Jane taught English and Technology to grade nine learners and understood teacher leaders to be: *“practitioners who are empowered to make critical decisions about the process of education”* (Jane, II, p.3). She believed that they: *“seize the opportunity and take the initiative, improvise and makes things happen”* (Jane II, p.1). Like Jen, Jane viewed teacher leaders as role models. Jane attests to this: *“You should have excellence as your standard, it’s no use going out there and asking your colleagues if their work is up to date, or if their files are up to date if yours is not in order”* (Jane II, p.2).

Unlike Mary, Jane believed that teacher leaders were life long learners in their subject matter. She alluded to this point when she said: *“I wouldn’t say experts because each day we learn new things. No one is an expert but they should be one step ahead to be a mentor, in the leadership skills as well as knowledge”* (Jane II, p.3). Jane believed that in the absence of

leadership skills, even the best curriculum experts might find it difficult to lead and mentor other teachers. She questioned the concept 'expert' and acknowledged that certain personal attributes promoted success in teacher leadership roles:

...you should have good communication skills, be able to communicate with your colleagues. You should also be courageous and take on challenges. You should be able to communicate with one another, so you can get the person on your side. You have to get them on your side, so they will follow you, to see the light that you see and follow on the same path (Jane II, p.2).

Implicit within this quote is the notion that teacher leadership is about influencing colleagues towards a common vision. Furthermore, like, Harris and Muijs (2007), Jane believed that purposive action from the principal would enhance teacher leadership opportunities in the school for herself as well as other teachers. She explained that: *“Teacher leadership can be promoted when the head teacher focuses on creating a caring ethos where teachers feel supported and valued, where you are also given opportunities to work with and learn from each other” (Jane J, p.1).*

4.5.2 The altruistic and reflective practitioner in the zone of the classroom

Jane was a charismatic teacher who led her learners in the educational process. Her leadership role in the classroom (zone one) was largely attributed to her reflective practices. She explained: *“...to be a better teacher leader in the classroom you must have the knowledge on how to present subject matter, how students learn the subject and the available curriculum” (Jane, J, p.9).* The data suggested that Jane had great insight into how she planned and executed her lessons and I argue that having this insight resonated with the art of reflective practice. When I observed Jane in her classroom, immediately after the lesson, she almost spontaneously began to evaluate her lesson: *“She critiques the lesson, identifies the problem areas of the lesson and proposes possible solution to the problems” (IOB, p.6).* Day and Harris (2002) argue that teacher leaders need to evaluate their lessons and reflective on their practices, and this leads to continual professional development and effectiveness and results in over all school improvement.

In her IQMS report, Jane was described by her DSG as: “...educators who organises a positive learning environment. The learners are engaged in appropriate activities and are encouraged to be self-disciplined. The educators acknowledge and respect individuality and diversity” (DOCS, IQMS, p.1). While Jane’s IQMS scores were not as high as Mary’s or Jen’s (DOCS, IQMS, pp.1 -4), I noted that Jane was given a higher score for issues dealing with human relations. Her teaching methodology was dominated by a sense of humanity and empathy towards her learners: “We should not give up on our learners, even the weak one; they are the ones that need the extra help” (Jane II, p.9). Jane was the classic humanitarian because she exercised patience and tolerance especially with learners that had barriers to learning. Ironically it was for this very same reason that Jane’s IQMS score centred around the average mark. Jane spent so much time assisting learners with barriers that she had fallen behind the time frames set out in the work schedule. When I brought this to her attention she explained: “I have to go at the pace of my kids. How can I move to a new section if my learners are still battling with what is being taught to them? Especially the English second language learners” (IOB p.2). This quote captured the altruistic nature of teacher leadership that was enacted by Jane. Jane challenged the status quo and was prepared to sacrifice good IQMS scores, which had a monetary gain attached to it, for the betterment of learners. Jane’s IQMS report made reference to the fact that her lesson planning supported the needs and the development of learners’ skills and knowledge: “Lessons were appropriately tailored to address learner’s strengths and weaknesses” (DOCS, IQMS, pp.1 -4). What emanated from the IQMS report was that Jane’s strength as a teacher leader was not so much in her expert knowledge of the curriculum but her compassion for children with barriers to learning.

My observation of her lesson confirmed this: “She focused on the weaker learners whilst giving the intelligent learners the necessary guidance they needed” (IOB, p.7). Jane did not neglect these learners but rather she instilled in them a sense of purpose and pride. Despite Jane’s success in leading in the zone of the classroom, she did mention that she faced challenges in this zone: “as a teacher I could know my subject matter well, I can have all the requirements to have an excellent lesson, such as the best resources, but if learners arrive late at the classroom and are disruptive in the class, this can be a problem even to the best of teachers” (Jane, II, p.9). Coupled with this barrier, a further barrier emerged: “Also the language barrier is a problem, whereas kids don’t understand English. When you are speaking to this child and he or she doesn’t know what you are saying in the classroom, so language barrier is also a problem” (Jane, II, 9). Yet despite her perceptions of the language

barrier, she did cater for this barrier by engaging her learners in group work activity. In the lesson that I attended: “*Jane mixed the groups such that the English first language learners were grouped with the English second language learners*” (IOB, p.8). When I questioned Jane about this she explained: “*it is a strategy I use, to give support to learners that are English second language*” (Jane, II, p.9). Ironically the very same barrier that Jane believed had restricted her leadership in the class, I believe enhanced her leadership potential, because, by employing strategies to overcome the language barrier, Jane engaged in reflective practice and, problem solving. This resonated with the process of action- research which, Day and Harris (2002) believe, leads to improved classroom practice. Like the ripple that hits the rock and moves around the rock, when Jane came across the language barrier in her leadership role in zone one, she strategised and moved around the barrier by engaging learners in group work and herself in reflective practice.

4.5.3 Teacher leadership in zone two: professional development

Jane led a professional development initiative in the school that focused on developing computer literacy skills amongst educators. This leadership role was an example of zone two, role three since Jane was leading in-service training in extracurricular activities beyond the classroom. The principal delegated this leadership role to Jane based on her expertise in computer programming and computer literacy. These workshops were conducted once a week for the duration of one hour after school. Jane acknowledged the cooperative attitude of educators towards this professional development workshop. She describes how: “*Educators were co-operative. They paid attention and supported me all the way. They made me feel valued, helping and sharing my knowledge and skills with others makes me feel proud and makes me feel like a professional teacher leader*” (Jane, J, p.7). However a high staff turnover posed as a barrier to the professional development initiative. For Jane it became difficult when she had to teach educators and then re-teach educators as they came into and left the school. This required extra time or a revision of the workshop program.

Jane was also on the Development Support Group (DSG) of three educators on staff where she engaged in IQMS activities such as peer assessment (zone two, role four). There was also evidence of joint assessment techniques and curriculum development between Jane and other educators in the school: “*We sit together as a technology team and plan our programme of assessment and we decide how we are going to pace ourselves to complete the work*

schedules” (Jane, II p.4). While Jane in her capacity as a technology educator led in zone two, leadership roles for Jane as an English teacher were, hindered. The data led me to believe that this was largely due to the fact that Jane did not have a formal English qualification. I have discussed Jane as teacher leader in zones one and two and now I move to zone three.

4.5.4 Teacher leadership at a whole school level

In this zone I have elected to discuss two leadership roles enacted by Jane. The first is as the co-chairperson of a body referred to as the Institution Level Support Team (ILST). The second is as the staff representative on the school governing body. In August 2008 our school was declared a Full Service School by the Department of Education. The DoE describes a Full Service School as “an ordinary schools which is specially equipped to address a full range of barriers to learning in an inclusive education setting” (DoE, 2008 p.7). As the co-chairperson of the ILST, Jane’s role was to put the aims of the Full Service School into operation. Jane was initially afraid to take on this leadership role. She explained: “*At the beginning, I was scared because I was uncertain if I could take on such a huge responsibility, eventually I plucked up the courage to take on this responsibility, now I am proud of myself and I feel like a true leader*” (Jane, J, p.6). Jane’s determination and commitment to see the ILST succeed despite barriers was summed up in the following quote: “*They (members of the ILST) should not sit back and say, we do not have it , they should go out there and make things happen .Be self motivated ,self driven and self developed*”(Jane II p.1).

Minutes of a staff meeting held on the 19th of January confirmed that Jane was nominated and elected as the educator representative on the SGB. The following extract was taken from the minutes:” *There are 20 votes in favour of Jane. Jane is our new educator rep on the school governing body*” (DOCS, p. 136). Her task was to present educators’ inputs at governing body meetings. Jane confirmed that a lot of the anxiety and insecurities she experienced in taking up this leadership role were alleviated, through the support she received from various stakeholders. She wrote: “*I received a lot of support from the staff and management. The person who had me believe in my self is my deputy principal*” (Jane J, p.5). She continued: “*I also obtained a lot of support from the community and the parents on the governing body*” (Jane J, p.5). In this leadership role, Jane engaged in leadership activities that focused on school level decision- making, organisational diagnosis and school developmental planning which constitute examples of leadership in zone three, role five. Her success in this particular

leadership role encouraged Jane to take up other leadership roles in school. She explained: *“I know now that I can take on any challenge that the school might throw at me because I strongly believe that I will receive the support from my principal, deputy principal and staff”* (Jane J, p.5). Jane’s leadership roles in zone three boosted her confidence to lead beyond the boundaries of the school into community (zone four). Jane’s particular case again supports my ripple effect analogy in which I contend that leadership in one zone influences leadership in the other zones. In the next part of this section, I discuss Jane’s leadership role in the community.

4.4.5 Community -based leadership

Jane believed that teacher leaders should establish strong community relationships and the following quote attests to such a perception: *“you should have a strong community influence. Be strongly involved in community development. Going out there and raise funds and build the community”* (Jane, II, p.3). Jane was actively involved with the local HIV/AIDS orphanage in the community. She believed that her position as a teacher in the local school obliged her to do her civic duty and make a contribution to the community. She explained that: *“as a leader you should make sure that you have some involvement in the community because people out there don’t want to know how much you know until they see how much you care”*(Jane II ,p.3). She arranged for teachers from our school and other members of the community to teach these orphaned children, read stories to them, teach them how to colour, draw and write. She was a liaison between the school and the orphanage. She led an initiative in the school to raise funds for the orphanage. She confirmed this:

At the moment, I am trying to arrange for the teachers to give a certain amount of money; we can collect the money at the end of the month. We can go to an orphanage, and try and fund the orphanage. So if we get R400 we could go to this place and ask what they need for the month and buy it for them. So that’s basically getting our school and our teachers involved in community development (Jane II, p.3).

Jane believed that she would be supported in her initiative: *“I may not receive any support from my principal. I will receive support from the majority of our staff members and the deputy principal. He is strongly involved in community development”* (Jane II, p.3). When asked why she thought that the principal would not be involved she explained: *“He doesn’t*

have a very good relationship with the community. So he is not really interested in community development. He will listen to the ideas, he will attend meetings and all that but he won't be involved in a sense that he would not go out there and hand the food to these kids and whatever" (Jane II, p.4).

Through Jane's efforts and her leadership, a supportive bridge was built that connected the school and the community. The data led me to believe that Jane's leadership role in the community focused mostly on humanitarian issues. In contrast, she acknowledged that her involvement with curriculum issues beyond the school (zone four, role two) was rather limited. She attributed this barrier to the fact that the DoE had not provided many opportunities such as workshops and cluster meetings for educators in the General Education and Training (GET) phase. Jane explains: "*We do not have cluster groups like those in grade 10 11 and 12" (Jane, J, and p.13).* Therefore, opportunities to network with other teachers from neighbouring schools on curriculum issues were restricted because structures such as cluster groups had not been established. This concludes my presentation on the enactment of leadership by Mary, Jen and Jane.

I believe that the data presented so far in this chapter supports my argument that the four zones in which teacher leadership can be enacted in the model should not be seen in isolation, but rather they are inter-related and connected. I see these roles as having a "Ripple Effect" on each other. Like the ripple effect caused by the stone, the data led me to believe that teacher leaders, through their ability to lead in the classroom, were able to extend their leadership ability beyond the classroom, engaging in leadership roles within learning area departments or even across departments. I believe the leadership experience, skills and knowledge gained in one zone will allow the teacher leader to progress and lead in other zones.

Extending the analogy further I, argue that teacher leaders are change agents. When the stone (teacher leader) enters the water (school) it submerges and the sets up the ripples (leadership roles in the different zones). These ripples firstly change the physical appearance (structural organisation of the school) of the water and secondly these ripples might set up invisible underwater currents (changes in cultural norms). In other words, when teacher leaders immerse themselves in the school environment and take on leadership roles in the different zones, they are able to affect and influence the structural organisation and well as the cultural norms in the school. This I argue resonates with the notion of teacher leaders as change

agents. I now present and discuss my findings in response to Research Question Two. I focus on the culture and context of the school with the aim of extracting the factors that enhanced the development of teacher leadership for these three teacher leaders.

4.5 ENHANCING FACTORS IN THE DEVELOPMENT OF TEACHER LEADERSHIP

The factors that emerged from the data, in the study, that enhanced teacher leadership development in the case study included a collaborative school culture, leadership skills, attitudes and values, the representative power of democratic structures, professional development opportunities, availability, and access to teaching resources.

4.5.1 Collaborative Cultures: Team work, Participatory decision-making and a shared vision.

It was evident from the data that all three teacher leaders viewed collaboration as an important prerequisite for enhancing their role as teachers leaders. Their views were aligned to Grant's (2006) view that for teacher leadership to flourish, a collaborative school culture is important. Mary, Jane and Jen all agreed that they had established collaborative cultures within the confines of their classroom, within their various subject departments as well as across department at a school level. The following quote attests to this: "*What all teachers' desire is collaboration or togetherness. Speaking one sort of language with relation to the school, strengthening ties with one another in the school*" (Mary, FGI, p.6). Collaboration was also established with schools across the local community. Mary qualified this: "*Creating in the community an atmosphere to raise student performance. We should all be working towards a common goal, parents, teacher, learners and even the department*" (Mary, FGI p.6). Jen supported Mary's view: "...*creating together with others a new future that will encapsulate the new beginnings we all dream about, moving from the old pattern of thinking to the new*" (Jen II, p.1). All three teacher leaders acknowledged the importance of forming collaborative relationships with their colleagues in an attempt to work towards a common vision and of having common shared norms and values within the school organisation. Survey data from the entire staff revealed that 92% of the respondents supported the view that there was collaboration in the school. This notion of collaboration supports the view of Little (1995) that when teachers learn from one another through mentoring observation, peer coaching and mutual reflection, then teacher leadership can be greatly enhanced. Similarly Harris and

Muijs, (2003) argue that teacher leadership is enhanced when the school ethos promotes collaboration and shared decision- making within a culture of trust, support and enquiry.

Structural changes in the case study school which enhanced a collaborative culture within the context of the school included making the time to meet each another in order to plan and discuss curriculum related issues and assessment over the weekend. Mary attests to this initiative: *“Sometimes there isn’t enough time during school hours to work with other educators on curriculum issues, so having the school open on weekends helps”* (Mary, FGI, p.3). Minutes of a staff meeting held on the 5th of March 2008 confirm such an initiative being introduced. The minutes read, *“The school will be open on Saturday for those teachers who want to come in and work”* (DOCS, p.72). This initiative was a viable option for those educators who wanted to work collaboratively, but did not have sufficient time during school hours.

All three teacher leaders cited examples where they were delegated authority by the SMT to work together in teams and lead other teachers in whole school development issues and curriculum related matters. This type of collaboration could be described as “contrived collegiality” (Hargreaves, 1992). Critics of contrived collegiality may argue that teacher leadership and contrived collegiality can not co- exist with each other. Hargreaves (1992) contends, “In contrived collegiality collaboration amongst teachers was compulsory, not voluntary and was bounded and fixed in time and space” (p, 23). I argue that despite the limitations inherent in contrived collegiality, it can create opportunities for teacher leaders to lead, like in did for the three teacher leaders in the case study school. I am of the view that no school can escape its micro political perspective and, as a result, contrived collegiality will always exist in the school environment. But I believe that the emphasis should not be on how teachers got together but what they do when they are together. According to Steyn:

inherent in team work is the process of shared decision making. Creative solutions to divergent issues are produced in group synergy where the power of two or more people to achieve a goal is greater than can be individually achieved (2000, p.272).

Therefore based on evidence from the study, I argue that it may be premature to dismiss the notion that contrived collegiality and teacher leadership cannot co-exist and I believe that its role in enhancing teacher leadership should not be undervalued.

Mary made mentioned of subject meetings during which teachers discussed problem solving strategies and classroom management practices: *“Teachers in my department we sit together and we discuss the challenges we are facing especially because of the new curriculum. What are problem areas in our teaching and classroom and how we are going to overcome these problems”* (Mary, FGI, p.3). Wenger (1998, p.54), refers to these collaborative structures as ‘community of practice’, which are “characterized by learning as a social participation through mutual engagement and the negotiation of meaning where participation is a process of being active participants in the practices of social communities”. I argue that within this community of practice, these three teachers felt secure enough to reflect on their teaching practices and revealed to other teachers the challenges they faced in the class and in the school. The data led me to believe that for teachers to openly communicate their challenges to other teachers in the community, requires a high degree of trust amongst the participants in this community. *“Mary, Jane and Jen interacted, informally with other teachers; and discussed issues that related to the curriculum, assessment and general classroom management”* (IOB, p.12). Jen endorsed my observation: *“Yeah, we do that because everyone is together in the staffroom, it’s convenient and somehow we just automatically start talking about the lessons we had and what went on during the day”* (Jen, FGI, and p.7). This I conclude was an example of spontaneous collaboration. Hargreaves lends support to my argument when he says “Collaborative cultures emerge from teachers themselves as a social group where the teachers themselves establish the tasks and purposes for working together. Teachers work together in brief, yet frequent informal encounters” (1992, p.24). Therefore I believe in these communities of practice true collaboration is established when interaction amongst teachers is natural, spontaneous, voluntary and development oriented. The data leads me to conclude that these professional learning communities can be sustained through shared decision-making and when dialogue supersedes monologue.

Survey results showed that all five SMT members (100%) agreed that teachers were allowed to participate in school level decision- making. But what exactly does ‘participate’ mean to these SMT members and do they have the same interpretation of this concept as the post level one educators? While the evidence suggested that teacher were involved in school level

decision making as I have illustrated earlier on in this chapter, one needs to question what issues teachers were allowed to make decisions about, and whether these were trivial issues or crucial to the functioning of the school? I argue that sustainable collaborative relationships between the SMT and the teacher leaders are crucial for school improvement. If schools are to improve then a re-conceptualisation of leadership is required whereby managers and teachers share in decision making and take risks together (Chisholm, Motala and Vally, 1999). However, this does not mean that the role of the principal becomes redundant (Grant, 2008). On the contrary, the role of the SMT becomes one of holding the “pieces of the organisation together in a productive relationship” (Harris and Muijs, 2005, p. 28).

Mary, Jane and Jen acknowledged that they were also a part of professional learning communities beyond the boundaries of the school. They cited examples of being cluster coordinators, facilitators of circuit workshops, and being involved in cluster moderation. “*We get together as a group, we have to take different schools look at individual problems that educators have in their schools and try to assist them, try and overcome their problems in a specific area*” (Mary II, p.3). These professional learning communities were based on trust and mutual learning and Jen as describes presented a forum for joint initiative across the circuit. Jane qualified this perception: “*when you are sitting with people from different schools they have different teaching and assessment techniques that you could use, so there is various techniques and strategies we can share and learn from one another*” (Jane, II, p.2).

The data also suggested that the enactment of teacher leadership by Mary, Jane and Jen, was being enhanced and supported by important stakeholders external to the school. This perception was qualified by Jen: “*Maybe learner A is on drugs, then we can bring in religious leaders or people from the community, nurses and doctors to motivate the child. Get the parents, get in the social workers. (Jen FGI, p.7)*. The intuitive teacher leader will know that establishing collaborative relationships with these various stakeholders are fundamental to the developmental of teacher leadership. My argument was augmented by Jane: “*Teacher leaders should be able to build a meaning relationship with important stakeholders like the SGB, the parents, the community, religious leaders*” (Jane, FGI, p.6). The second enhancing factor that was identified in the study centred on personality traits.

4.5.2 Teacher Leadership knowledge skills, attitudes and values

Arguably one of the key enhancing factor of teacher leadership in this study were personality traits displayed by the teacher leaders which I believe was a culmination of skills, attitudes and values. Confidence to lead, courage to take risks, humility, good interpersonal skills and tolerance for diversity featured quite strongly in the study. All three-teacher leaders saw themselves as lifelong learners who were engaged in continual self-development. They believed that being confident in the subject knowledge and demonstrating leadership allowed them to be expert classroom teachers and to lead in zone one. Jane qualified this: *“Each day we learn new things. But in order to lead we have to be one step ahead in your knowledge and your leadership skill”* (Jane, II, p.3). Mary argued that her confidence in her expertise in the classroom gave her the confidence to take up leadership roles in zone two and three that pertain to her subject matter. She confirmed this perception: *“I am an accounting teacher, I am confident about my learning area. If I am asked to draw up a budget, I must know what is required in drawing up this budget. I will be able to come up with this budget”* (Mary II, p.1). Jane believed that being confident allowed them to influence other teachers to share in their common vision for the school. She qualified this: *“You must have confidence in yourself to have a positive attitude towards whatever you are going to do and to get others to share your ideas”* (Jen, FGI, p.1). The teacher leaders also believed that having a ‘holistic perspective’ of the school culture and structure and being au fait with the tacit knowledge of the school (Fullan, 2001) boosted their confidence to lead during the change process. As Jen explained: *“The teacher leader would know the in’s and out’s of the school, the curriculum, the timetable. Stuff to do with discipline, how the school fund is being spend. The teacher leader becomes involved in all these things”* (Jen, FGI, p.7)

Furthermore, having good interpersonal relationships, with all stakeholders as well as good communicative skills, made it easier to communicate the common shared vision.

Katzenmeyer and Moller (2001) argue that the ability to build positive interpersonal relationships is fundamental to the sustainability of the professional learning community. Being sensitive and sympathetic towards colleagues and learners made these teacher leaders more approachable and therefore easily accessible. As Mary explains: *“when you are approachable and have this ability to liaise with everyone, and have this (pause) good relationship, I think you can make things work”* (Mary, II, p.2). Katzenmeyer and Moller (2001) further argue that a teacher needs to possess qualities such as competency, credibility and being approachable, in order to claim, readiness for teacher leadership roles. All three

teacher leaders had a deep commitment to “enquiry led” teaching made visible in their ability to reflect on their teaching practices with the aim of improving teaching and learning in the classroom (zone one). Analysis and application of reflective practices by teacher leaders must become part of their routine professional activity (Hopkins and Harris, 1999). A good work ethic accompanied by hard work, efficiency, excellence, honesty and integrity had earned these teacher leaders credibility amongst their peers, and management especially with regards to teacher leadership roles in zone two and three. Jane qualified this view: *“You have to be fair in whatever decision you take, in this way you earn the respect of the other educators” (Jane J, p.9)*. Being passionate about their learners and their subject had driven their intrinsic motivation to forge ahead despite the obstacles and challenges that these teacher leaders faced. I reiterate a previous quote to substantiate this view: *“I did it for no remuneration but to let my subject grow and at the same time keeping the interest of the learners the community as well as parents, they are all important to me” (Mary II, p.2)*.

Having humility and displaying tolerance were key values in the enhancement of teacher leadership development. Humility earned them respect and credibility amongst their colleagues: *“Humility is an important quality. If you have made a mistake admit it and learn from your mistakes. It makes you a better person” (Mary, J p.8)*. Furthermore exercising tolerance reduced resistance from other teachers. Mary attests to this *“tolerating the negativity, you got to be above all that. I’ll try to face this head on and if you are going to have problems on the way, see it as a learning experience, learn from it and improve” (Mary II, p.2)*. Similarly, Jen explained: *“you have to give and take. You cannot just be one track minded. You cannot only think about yourself, you have to think about others and how you are going to move forward” (Jen, II, p.1)*. I believe that these two values are significant for teacher leadership development in South African schools because many of our school are multicultural and multiracial. If teachers want to lead they should acknowledge and accept that with diversity comes a diversity of solutions, expertise and suggestions for solving particular problems that teachers face. Closely linked to tolerance is the value of courage.

Being courageous was an attitude that allowed all three to face challenges related to curriculum issues, conflict situations and resistance from other educators especially when the resistance was emanating from those above them. Grant (2005, p.523) identified courage as the most common value innate in teacher leaders when she says, “A true leader is one who has courage to take the initiative to make changes”. The courage to persevere despite

resistance from colleagues as well as the formal bureaucratic management system was a hallmark of all three-teacher leaders. Mary attests to this perception: *“I’ll get affected if someone is resistant towards me but I will be strong and get on with my job and do what is expected of me”* (Mary II, p.5).

In my ripple effect analogy, I argued that the weight of the stone would influence the number of ripples that are formed. So the heavier the stone then more ripples will be formed. Like the weight of the stone, teacher leaders who possess leadership skills, attitudes and values ‘weigh heavy with leadership potential’ and are able take up leadership roles in most if not all of the four zones of the model. Furthermore, like the ripple wave that hits the rock and slowly moves around it, I argue that when these teachers were faced with a potential barrier to their leadership they planned strategically using the leadership skills cited above, to move around the barrier. This concludes my discussion on personality traits as enhancing factors. I now focus on contextual factors that enhanced the enactment of teacher leadership.

4.5.3 The representative power of democratic structures in school

Data suggested that teacher leadership roles were enhanced by the SMT, who had created and supported leadership initiatives in the case study school. The principal was perceived to be devolving power through the organization, and letting go of his authoritarian mentality to a certain degree: *“Basically he wants his ideas and his beliefs to be put forward first and if you got something, maybe he would resist it or he would not accept it wholeheartedly. However over the years he has changed, He has now softened in his human relationship and control, I have noticed that”* (Jen, II, p.5). Although the devolution of power by the principal could be described as largely authorised distributed leadership, I argue that it was still a step in the right direction in the journey to enhance teacher leadership in the school. I believe the driving force behind the principal’s decision to distribute leadership to level one educators lay in the representative power of distributed leadership. Over the past two years, the school learner population had increased considerably to 960 learners in 2009. However, the school had a shortage of management staff. Consequently, level one educators were given leadership roles and tasks to make up for the shortage in management personnel. Mary confirmed this:

I think he is trying to accommodate it but he is still finding it difficult because of his personality. I am not saying he never gives me a chance.

He did give me a chance by asking me to take on an acting post, but sometimes you are afraid to approach him on certain aspects, because of his personality and behavior (Mary II, p.5).

This scenario illuminated the representational power of distributed leadership .Harris and Spillane argue that:

distributed leadership represents the alternative approaches to leadership that have arisen because of increased external demand on schools . Schools have restructured their leadership teams and created new roles to meet the needs of the extended school agenda (2008, p.1).

In addition to this the SMT survey results revealed that there was a 100 % consensus amongst the SMT members that teacher leadership should be supported and enhanced within the school context and beyond the school. When compared against the teacher survey questionnaires the response rate for the same variable averaged around 75%. Therefore, most of the teachers in the school perceived the SMT to be enhancing teacher leadership in the school. I now move on to discuss the auxiliary enhancing factors of teacher leadership. However the page limitation of a half- thesis does not allow me to discuss these in detail, so I shall just mention them briefly.

4.5.4 Auxiliary Enhancing Factors

Auxiliary enhancing factors were factors that I believe supplemented the core enhancing factors of teacher leadership development such as those discussed above. I argue that while auxiliary enhancing factors were not crucial to the development of teacher leadership they nevertheless did contribute to the optimum enhancement of teacher leadership. In this study two such factors were identified: opportunities for professional development and availability and access to resources.

4.5.4.1 Professional development opportunities

Much research has shown that leadership can to a large extent be learnt and developed (Harris and Muijs, 2003). Working as teacher trainers, peer coaches and curriculum specialists provided Mary Jane and Jen with opportunities to examine their own practice while helping other teachers to learn. Katzenmeyer and Moller argue that “in a leadership role teachers can

improve their own skills by helping other practitioners” (2001, p.33). All three teacher leaders concurred that being involved in professional development initiatives enhanced their role as teacher leaders. Jane confirmed this: *“At the workshops and seminars you have your mentors and mentees. They basically also tutor you and keep you up to date about new programs”* (Jane, II p.5). The SMT members provided opportunities for professional development and their vision was echoed in the words of Muijs and Harris (2005, p.442) when they say “the SMT must provide time and resources for professional development activities and validate the concept of teacher leadership”. These teacher leaders acknowledged that leading professional development initiatives at school had increased their confidence to lead. This was qualified by Jane: *“Being an initiator, coordinator of events such as workshops and seminar, that makes you a better leader, in school”* (Jane, II, p.2). I believe that teacher leadership will flourish, when capacity building workshops are site based and aimed at enhancing leadership skills. My view is supported by Grant, (2008, a) who argues that opportunities for professional development focusing on leadership skills should become a priority in schools. Little (1995) and Ash and Persall (2000) caution that professional development initiatives should be site based, collaborative and should take into account the goals of the school and the needs of the individuals. The second auxiliary factor that was identified from the data was the availability of resources.

4.5.4.2 Availability and Access to Teaching Resources

All three teacher leaders agreed that having access to teaching resources enhanced their role as leaders. Jen qualified this: *“The computers help us with a lot of admin work and therefore we have some time to serve on committees”* (Jen, FGI, p.9). Learners having their own textbooks in every subject gave these teacher leaders more contact time with their learners and enhanced their leadership in the zone of the classroom, as the following excerpt illustrates: *“Learners having their own textbook, saves me time from writing too much on the board and therefore I can spend more time teaching the learners”* (Mary, FGI p.9). The data led me to believe that, in this case study school; resources enhanced teacher leadership in two ways. Firstly, they helped the teacher leaders deliver more stimulating lessons: *“The internet is good for planning and preparing a lesson .It also helps me to gain knowledge on topics I am going to teach”* (Jane, FGI, p.9). Secondly, they reduced the amount of administrative and manual work that these teachers had to do. As a result, they had more time to become, involved in leadership activities at the school. This then raises an important concern regarding teacher leadership. Is the nature of teacher leadership such that it could flourish more in

affluent schools with many resources as opposed to the poorly resourced schools? I think it does. When compared to my ripple effect analogy, I argue that the greater the weight of the stone the stronger the force of impact, when the stone hits the water. This leads to a greater change in the physical appearance of the water and stronger underwater currents. Similarly the more experience, knowledge and skills the teacher leader possesses then the stronger their influence becomes on the school's structural organisation and cultural norms. This concludes my discussion on the enhancing factors of teacher leadership in the case study school. I now present a discussion on the second part of Research Question Two, "What factors hindered the enactment of teacher leadership?"

4.6 FACTORS THAT HINDERED THE DEVELOPMENT OF TEACHER LEADERSHIP

Some of the key barriers to teacher leadership in this study included, autocratic leadership, resistance from educators to lead, time and frequent policy changes.

4.6.1 Autocratic leadership at a whole school level (zone three)

All three teacher leaders agreed that whilst the principal did support and promote teacher leadership development; this support was only restricted to certain leadership zones. Jen qualified this: "*Sometimes we follow a very autocratic style of leadership. Whenever you come up with an idea about how the school can move forward, our ideas are shut down. We're supposed to follow the old pattern of thinking again*" (Jen, II, p.3). The data led me to believe that the principal was only supportive when it came to them taking up leadership roles in the zone one and two but was less supportive when level one teachers wished to engage in leadership roles beyond zone two unless he himself delegated the leadership role. He felt that at the level of school initiatives, this was the domain of the management team and educators should not question their decisions. As Mary explained: "*He can not dictate he must give others a chance in terms of listening to their responses, discussions, communicating, we must be free to make input*" (Mary FGI, p.1). This perception was corroborated by the SMT survey which revealed that one of the five SMT members (20%) believed that only the SMT should make decisions about whole school issues.

In the case study school, staff meetings were supposedly the forum for 'consultation' with level one educators on whole school issues. However all three teacher leaders believed that

the principal adopted the view that when he informed staff about decisions taken by management with regard to whole school issues, he believed that this constituted democratic and participatory management. In contrast, for Mary, Jane and Jen consultation embodied discussion, negotiation, and brainstorming ideas. For them consultation at staff meetings was mere tokenism of democratic and participatory management. In line with this thinking, the minutes of staff meetings revealed that these meetings were generally a monologue affair where only the principal spoke. Teachers were afraid to make any input and to a large extent they remained quiet. Mary lamented “*Sometimes you have an idea that is different to his, but you are too scared to say it because if anyone challenges his ideas, he becomes rude and aggressive and starts a personal attack on you*” (Mary, FGI, p.6). From past experiences they had learnt that challenging a decision made by the principal could result in them being personally victimised or ridiculed at staff meetings. This view was endorsed by Jane: “*The other teachers they also support your idea but they are too afraid to stand up and say anything because they know that he will victimise them*” (Jane, FGI, p.6).

What emanated from the data was that the principal engaged in bullying tactics to ensure that his ideas were adopted, within the façade of consultation. This perception was supported by Mary: “*leadership is a two way thing, admit when you are wrong, I think will make you a better leader and learn from your mistakes*” (Mary FGI, p.1). The data led me to believe that the headship was devoid of humility because the principal was generally not prepared to admit when he was wrong. To me this leadership scenario bears a slight resemblance to the “Great Man Theory of leadership which is linked with stereotypes of leaders in the heroic mould, who are usually of male gender” (Coleman 2005, p.9). Using Spillane’s (2006), model of distributed leadership, I argue that the leader- follower interaction was more democratic in zones one and two when these teacher leaders interacted with learners and teachers respectively. However in situations linked to leadership in zones three and four, the leader-follower interactions between the teacher leaders and the SMT was very limited and the management structures became less democratic and more hierarchical.

When I compare the above scenario with my Ripple Effect analogy, I argue that in this scenario when the third ripple wave hits the huge rock, it would in most instances hit the rock and dissociate. Similarly when Mary, Jane and Jen came across autocratic leadership as a barrier in zone three, they forewent their leadership initiatives. This was largely due to fear of the principal and his legitimate power in zone three. Therefore initiating teacher leadership

roles in zone three without the support of the principal became a futile experience unless the teacher leadership roles were delegated by the principal.

4.6.2 Resistance to Teacher Leadership: The egalitarian ethic

I argue that for many teachers in South African schools, the leader- follower dualism mentality still persists where many post level educators believe that leadership is the responsibility of the people in formal management positions. In the case study school a similar scenario existed. The following comment from Mary signals this view: *“This resistance is coming from some older educators who are envious” (Mary II, p.5)*. Jen endorsed this view: *“you hear the negative comments, that we are sucking up to management and that management is just using us ,but I take on these leadership roles because I like the challenge and I want to try new things instead of being stuck in a rut”(Jen FGI p.5)*. Research evidence shows that teacher leaders are intimidated by colleagues when taking up leadership roles (Harris and Muijs, 2007). One participant in the teacher survey questionnaire wrote, *“Teachers are afraid to be leaders because other educators always want to put them down. When someone steps up to do something teachers always find fault” (TSQ)*.

Wasley in her study of three teacher leaders documented that *“the egalitarian ethos of teaching makes it problematic for teachers to accept their colleagues as experts” (1991, p.166)*. This study reinforced the findings of Wasley’s study as the following excerpt illustrates: *“you are going to get people who will not want to accept you as a leader, the ones who have the same number of years as me and the same experience, who feel they should be given this opportunity. How come I am given this opportunity” (Mary, II, p.4)*. For many teachers, *“taking on leadership roles is risky territory, where the rewards are few and rejection from their peers, an almost certainty” (Katzenmeyer and Moller, 2001, p.79)*. Mary lamented, *“You do not have the official title and people want you to have that title. Whatever is expected of a normal HOD you are doing it, but some are negative and would not accept you in that position” (Mary II, p.4)*. Lord and Miller (2000) explain how teachers are called to be leaders in a profession that historically has few recognized avenues for teachers in leadership roles. Similarly, Boles and Troen (1994) argue that teacher leaders operate in a different professional space from their teaching colleagues.

In the case study school conflict and disputes arising from internal promotions created disharmony amongst a few staff members. A participant in the teacher survey questionnaire

endorsed this perception: *“The level one educator undermine some of their colleagues. They will only cooperate if the task is given to someone they like” (TSQ)*. For Mary, Jane and Jen this disharmony posed a challenge when it came to them constituting committees to collaboratively lead some initiative in the school. Jane qualified this view: *“You will have people in your committee the one’s that are skeptical and do not want to participate or do not do it full heartily or whole heartily” (Jane, FGI, p.5)*. This internal conflict within the school context, which in the words of Grant (2008) may result in a level of ‘bruising’, operates as a barrier to teacher leadership. Therefore, I argue that an egalitarian ethos was an obstacle for the institutionalization of teacher leadership in this case study school.

4.6.3 Time as a barrier to Teacher Leadership

A lack of time was identified by the three teacher leaders as one of the major barriers to their role as teacher leaders, especially in zones three and four. However, the SMT did make time available for these teacher leaders to lead in zone one and two and for tasks that were delegated to them by the principal. In this regard, each teacher leader was given one non-teaching period (NTP) per day. However no such support was forthcoming from the SMT if the leadership role was self-initiated. Therefore, Mary, Jane and Jen sacrificed their lunch breaks and spent time after school hours to lead any self-initiated leadership activity. Jane explains the impact of this in the following excerpt: *“There is no time during school hours. Well school closes about 14h45, so you’ve got to make time after that or I try and do it during the breaks because we do have a half an hour break” (Jane, II p.5)*. She continued: *“When it came to starting the religious services, I was not giving time during the curriculum to do the religious service; I had to conduct these services during the break, on a specific day” (Jane, II, p.3)*.

Furthermore, the data led me to believe that while these teachers had the will to lead, there were times when they forewent leadership roles in certain zones because of the time barrier. For example Mary felt restricted to lead in zone four and she cited family responsibilities as a reason for her not taking on any community based projects. She lamented: *“I would like to get involved in fundraising. I am in the commerce field so it would be a good opportunity for me to do something like that. Maybe I haven’t put myself out there, because with home and family time” (Mary, II p.4)*. In line with thinking, Seashore-Louise and Kruse (1996) argue that freeing teachers for leadership tasks and giving them more time to collaborate with colleagues is crucial to the successful implementation of teacher leadership in schools. Many local and

international empirical studies on teacher leadership highlight a lack of time as a barrier to teacher leadership, (see for example Wasley, 1991; Harris and Muijs, 2003; 2005, 2007; Grant, 2006; Singh, 2007). Closely linked to the time barrier was the barrier of frequent curriculum policy changes, which influenced the leadership practice in the case study school.

4.6.4 Policy changes and innovation overload

The high frequency of policy changes pertaining to the national curriculum (for example National Curriculum Statement, 2005; revised National Curriculum Statement, 2008) were also identified by the three teachers as a barrier to leadership. These policy changes hindered and challenged Mary, Jane and Jen especially when they engaged in teacher leadership roles in zones one and two. Mary recalled how some of the content in the accounting learning area had changed, and this posed a major challenge for her because she had not studied this new content in her Bachelor of Commerce degree. She explains: *“My accounting learning area, it is becoming difficult and challenging with all the new changes”* (Mary II, p.7). As a result, she found herself moving from an expert to a novice with regard to some sections in the accounting syllabus. Did this make Mary less of a teacher leader especially when one considers Harris and Lambert’s (2003) definition of a teacher leader being first an expert teacher? This raises a question about the notion of having expert knowledge. In response to this dilemma, Mary rose to the challenge and re-skilled herself through the use of resources and she also attended curriculum development workshops. Jen also complained about frequent policy changes as a barrier to teacher leadership. Jen describes her response as follows: *“ People in the department are always chopping and changing and we are trying our best to keep up and sometimes it’s difficult to be up to date with the work and the curriculum”*(Jen II, p. 3). The data suggested that this resulted in ‘innovation overload’ (Lumby, 2003), where the sheer volume of work that comes exhausts teachers attached to these changes. All three-teacher leaders linked frequent curriculum changes to a lack of time to engage in leadership activities. When the curriculum changed teacher portfolios, master files and assessment procedures were revised. Jane qualified this view: *“sometimes as often as we want to take up leadership roles it does not allow us because of this new curriculum it becomes difficult .It’s not saying that you cannot do it, but there is no time”* (Jane, II, p.8). Fullan (2001) notes that too much curriculum innovation within a short space of time can be risky as it can lead to ‘burnt out’ syndrome. This concludes my discussion on the factors that hindered teacher leadership development in this particular school context.

4.7 CONCLUSION

In this chapter, I presented and discussed the findings in response to the two research questions. In response to research question one the study highlighted that teacher leadership was enacted differently by the three teacher leaders. Three distinct descriptors emerged from the data for each teacher leader. The data described teacher leader one as an expert classroom practitioner, a mentor and curriculum developer in zone two, leading in the school's finance and examination committee in zone three and finally as a cluster coordinator in zone four leading curriculum development knowledge across schools. Teacher leader two emerged from the data as a transformative leader and a change agent across zones one, two and three. Like Mary, the data described Jen as the expert classroom practitioner; the mentor in zone two and in zone three she led all religious initiatives in the school. The third teacher leader epitomized the humanity aspect of teacher leadership when she led her classroom practice as a reflective and altruistic teacher leader. In zone two, she led professional development initiatives. At a whole school level, she assumed leadership of the ILST committee and also displayed leadership in her role as the staff representative on the SGB. In zone four, she maximized the humanity aspect of teacher leadership in her leadership role as the teacher liaison in the local HIV /AIDS orphanage.

I used the Ripple Effect analogy to describe the enactment of teacher leadership in this particular school context. Using Grant's (2008) model of teacher leadership as an analytical tool, the "Ripple Effect" enactment of teacher leadership described how teacher leadership roles in the different zones had the ability to influence each other and that attaining leadership in zone one can have a ripple effect in attaining leadership roles in other zones. I argued that such an enactment of teacher leadership confirmed that the four zones in the model of teacher leadership were inter-related and should not be viewed in isolation. In this study teacher leadership roles were both formal and informal. Teacher leadership roles were enacted predominately in zones one and two whilst leadership roles in zone three were limited and were generally practiced within a form of authorized distributed leadership. What emerged from the study was that some of the 'so-called' delegated leadership roles were in fact delegated management roles. Leadership roles in zone four were very limited, but generally self-initiated and emergent. The study also revealed that while some leadership roles were delegated, the leadership practices that embodied these roles were sometimes emergent.

Therefore, the study highlighted that delegated leadership roles can be an avenue for the development of informal emergent teacher leadership initiatives. The perception of teacher leadership that emanated from this study resonated with Hoyle (1980) and Broadfoot *et al* (1988)'s notion of the 'extended professional'. The study also concluded that there was a link between the way in which teacher leadership was perceived and the manner in which it was enacted.

In response to research question two the study highlighted that one of the key factors that promoted the uptake of teacher leadership was the re-conceptualization of school structure and culture aimed at establishing and sustaining collaborative structures and cultural norms within the school and beyond the school into the community. The data also supported the view that teacher leadership could exist in contrived collegiality cultures. Leadership skills, attitudes and values such as confidence, courage, humility, tolerance as well as having a good work ethic were crucial to the successful enactment of teacher leadership roles. The study showed that deliberate action from the SMT in creating opportunities for teachers to lead must be accompanied by the ability of the SMT to let go of authority and power. Site based professional development initiatives, which focused on leadership skills, enhanced the confidence of teachers to lead. The data also concluded that in this particular school context, having access resources enhanced teacher leadership.

In response to the second research question, the study further revealed that teacher leadership was hindered by both macro and micro barriers. Macro barriers were in the form of contradictory policy documents and frequent curriculum changes which led to innovation overload. Micro barriers operating within the school ranged from leadership being associated with headship, a lack of time and resistance from educators to lead. Autocratic leadership was a barrier to the development of emergent teacher leadership roles especially at a whole school level (zone three). This was largely because in zone three the principal exercised a lot of power and control due to his legitimate authority. A lack of time to lead due to family and personal responsibilities as well as being burdened with too many leadership roles hindered the development of teacher leadership. Resistance from other educators to lead change stemmed from an egalitarian ethic. The study also showed that a lack of job security and the educator's employment status were barriers to teacher leadership. This concludes my presentation and discussion of the findings in this study. In the next chapter, *Chapter Five*, I reflect on the key aspects of the study.

CHAPTER FIVE

CONCLUSION

5.1 INTRODUCTION

In this concluding chapter, I reflect on the common themes that emerged from the individual enactment of leadership by the three individual teacher leaders in this study and I attempt to understand it through a distributed leadership lens. Thereafter stemming from the main findings in this study, I propose a few recommendations on how to promote teacher leadership within schools that are similar in context. In addition, I reflect on the methodological approach used in this study and review the appropriateness of the case study method as well as the group project. As a consequence, I discuss the various limitations of the study. Finally, I suggest possible areas for further research.

This study aimed to examine what teacher leadership roles post level one educators took up in their school context and the factors that promoted and hindered this enactment. A comparative analysis was made between those leadership roles enacted by the three teacher against Grant's (2008) zones and roles model of teacher leadership as well as through the theoretical lens of Spillane's (2006, p.12) 'leader-plus practice' of leadership and Gunter's (2005) characterisations of distributive leadership. In this particular study, I argue that the enactment of teacher leadership can be best described using the Ripple Effect analogy and, I now move on to provide the evidence to support my argument.

5.2 THE ENACTMENT OF TEACHER LEADERSHIP: THE RIPPLE EFFECT

The ripple effect analogy manifested itself firstly in relation to the analytical model I used in the study and secondly in my theoretical framework of Gunter's (2005) characterization of distributed leadership. I believe that the data presented ample evidence to support my claim that the Ripple Effect was an apt analogy to use when describing the enactment of teacher leadership in this study. I begin this discussion by describing the ripple effect analogy as it related to the analytical model where I linked the analogy to the four zones of teacher leadership.

5.2.1 The Ripple Effect enactment of Teacher Leadership in relation to the

Model

Research literature on teacher leadership supports the view that teacher leaders are change agents in school, (see for example Wasley, 1991; Crowther, 2002; Katzenmeyer and Moller's, 2001, Muijs and Harris, 2005; Pounder, 2006, and Grant 2006). All three-teacher leaders perceived themselves as change agents. They attributed this change agency to them having a "holistic perspective" of their teacher leadership roles. They believed that their individual leadership roles were linked and influenced each other. For example, Jen explained: "*First in the classroom, then being staff secretary and organizing staff functions, participating in coaching sporting activities. Teacher leadership has a lot to do with, a holistic perspective*" (Jen II, p.3). This quote demonstrates how Jen led across the zones. Her leadership began in the zone of the classroom and then rippled out to other areas beyond the classroom. Similarly, Jane centered teacher leadership in the classroom and her ability to lead classroom practice gave her access to leadership roles beyond the classroom. Jane wrote: "*The management they know your capabilities in the classroom. They know you are leader in your classroom, so they are confident that you can take up other leadership roles in the school. It's like a ripple effect, one leadership role leading to another*" (Jane, J, p.5). The data confirmed that the teacher leaders' ability to lead in one zone influenced their ability to lead in another zone of the model. Jen confirmed this when she said: "*I have reached and attained being a teacher leader in my classroom. I feel I need to go to another level, wanting to experience something new and different and wanting to be given the opportunity to do something else for the betterment of others*" (Jen, FGI, p.3).

Evidence that emerged from the data converged towards a common perception from the three teachers that supports the view that all the zones in the model were inter-related and linked to each other. For example, Mary's role as a cluster coordinator helped her to be successful in her leadership role as a subject head. Mary explained: "*.....as a cluster coordinator I have a close relationship with my subject advisor. So I am able to advise the educators in my department and develop them and build their confidence*" (Mary II, p.7). This ripple effect enactment of teacher leadership across the four zones of the model was largely attributed to the beliefs and values of the three teacher leaders. The study suggested that beliefs did matter and these beliefs and values of the teacher leaders influenced their enactment of leadership roles and I move on to discuss this next.

5.2.1.1 The perceived notion of teacher leadership

All three teacher leaders agreed that their leadership roles were not only confined to the classroom and they dismissed the view of the teacher leader as the ‘restricted professional’ (Hoyle, 1980; Broadfoot *et al*, 1988). I contend that the way in which the three teachers defined and viewed leadership was largely the way in which they enacted teacher leadership in their schools. These three teacher leaders aligned their perception of teacher leadership to the notion of the ‘extended professional’ which refers to a teacher whose thinking and practice is not narrow and restricted to the classroom (Hoyle 1980; Broadfoot *et al* , 1988). All three teacher leaders extended their leadership beyond the classroom and their leadership progressed from one zone to the next in the model. The enactment of teacher leadership roles by Jane, Jen and Mary was aligned to Grant’s (2005, p.44) definition of teacher leadership as “a form of leadership beyond headship or formal position. It refers to teachers becoming aware of and taking up informal and formal leadership roles both in the classroom and beyond. It includes teachers working collaboratively with all stakeholders towards a shared and dynamic vision of their school within a culture of fairness, inclusion, mutual respect and trust”. I now move on to discuss the ripple effect analogy as it related to my theoretical framework of Gunter’s (2005) characterisations of distributed leadership.

5.2.2 The Ripple Effect of Teacher Leadership within a Distributed Leadership

Framework

The study also revealed that the enactment of teacher leadership by the three teacher leaders was firstly in the authorised form, thereafter it progressed to dispersed distributed leadership and finally it rippled out into the democratic distributed leadership phase.

5.2.2.1 The first ripple: Teacher leadership within an authorised distributed leadership practice

Teacher leadership roles were more often delegated to the three teacher leaders by the principal. In other words, very few of the roles were emergent, which implies an authorized distributed leadership context in the school that “operates within a hierarchical organization where the head distributes work to others. This type of work is generally regarded as legitimate as it is delegated by someone in authority and because it gives status to the person who takes on the work” (Gunter, 2005, p.52). Some post-level one educators challenge authorized distributed leadership. This was evident in Singh’s (2007, p.67) study where she

argued that post-level one educators viewed delegated leadership roles as the SMT 'passing the buck'. Yet in my study, the data indicated that delegated teacher leadership roles offered the teacher leaders a sense of security and all three were happy to work within an authorized distributed leadership practice. Mary confirmed this perception when she said: *"I think when a head of an institution delegates something to you, its only natural for you I think to accept it and go out there and try your best"* (Mary, II, p. 6). Delegated teacher leadership roles were much easier to execute as compared to the emergent teacher leadership initiatives. They are accompanied by support and legitimacy from the SMT. Jane reinforced this view when she said: *"If teachers in your school approach you, and ask you why you are doing this, I say it's not me doing it, it came straight from the principal. Therefore, there will be lesser problems. So I feel that being delegated is better"* (Jane, II, p.7). I concluded from the data that resistance from other teachers was limited in instances of delegated teacher leadership, as Jen explained: *"When you get any of your own ideas that you want to put forward not everyone wants to work in hand. So when you are delegated a duty, It is much easier that way, because other teachers cannot be negative about it because it's coming from the principal"* (Jen, II, p.4).

The study also highlighted that many of these delegated teacher leadership roles were formal in nature. While the teacher leaders perceived these roles to be leadership, I believe that some of these roles were largely management functions. This fits with Wasley (1991) as well as Ash, and Persall (2000) who argue that traditional leadership opportunities merely serve an efficiency function, rather than a leadership function. However although these roles were delegated, they paved the way for spontaneous informal teacher leadership practice to emerge. Therefore, I argue that SMTs have the responsibility to delegate teacher leadership where they see potential. As such the enactment of teacher leadership within an authorised distributed framework can work as a catalyst to inspire teacher leaders to initiate leadership in other areas and hence teacher leadership becomes emergent. In other words, we need to acknowledge the power of the ripple effect of teacher leadership.

I am of the view that South African schools cannot escape their formal, hierarchical structures and therefore I believe that delegated teacher leadership has its place in our schools and should not be under valued. It is the starting point to the enactment of teacher leadership, and although restricted, has its place in the practice of leadership.

5.2.2.2 The second ripple: Teacher leadership within a dispersed distributed leadership practice

The data also revealed a glimpse of dispersed distributed leadership in practice. In this second ripple of teacher leadership, the enactment became more emergent. All three teacher leaders took on self-initiated and emergent teacher leadership roles that aligned them with Gunter's characterisation of dispersed distributed leadership, which "is more autonomous, bottom up and emergent. This type of leadership acknowledges skills and expertise of others in an organization" (2005, p.54). I believe that Jane's leadership role as the ILST co-chairperson, Mary's role as cluster coordinator and Jen's role as the religious youth leader in the school are examples of dispersed distributed leadership. Unlike the delegated teacher leadership roles, I am of the view that dispersed distributed leadership roles are associated with the 'free will' of the incumbent. The data indicated that teacher leadership roles that were associated with "free will" were generally executed with passion and enthusiasm.

5.2.2.3 The third ripple: Teacher leadership within a democratic distributed leadership practice

The data further revealed that the three teachers engaged in leadership roles that, I argue, were closely aligned to Gunter's (2005) definition of democratic distributed leadership. Gunter argues that "democratic distributed leadership is, autonomous, bottom up and emergent but unlike dispersed distributed leadership democratic distributed leadership does not assume political neutrality but instead engages critically with organizational values and goals" (2005, p.54). While dispersed distributed leadership accepts the status quo in schools, democratic distributed leadership challenges the status quo by challenging inequities and inequalities that may exist in the school. In her role as the matric farewell coordinator, Mary challenged the status quo in the school by defying the wishes of the principal. Similarly, Jane in her leadership role as the HIV/AIDS orphanage liaison also challenged the status quo in the school. Jane knew that the principal would not favour such an initiative because of his poor relationship with the community, yet she still persevered and initiated such a project. In her capacity as the school religious youth group leader, Jen exposed the issue of drug and alcohol abuse amongst learners in the school and she got the community leaders involved in this issue as well. This challenged the status quo in the school because drug related issues were generally dealt with discreetly within the confines of the school. I argue that these leadership roles illustrated how these teacher leaders challenged the status quo of the school in order to

address social justice issues. Therefore, I align these leadership roles with Gunter's (2005) definition of democratic distributed leadership.

This concludes my discussion on the ripple effect enactment of teacher leadership.

I now move on to discuss the findings in relation to research question one, through the theoretical lens of Spillane's (2006) multiple-leaders perspective of distributed leadership practice.

5.3 'LEADER-PLUS ASPECT' BLURRED IN ZONE THREE

With regards to Spillane's (2006) 'leader-plus aspect' of the distributed leadership practice, the study indicated that in zone one and two of the model the 'leader-plus' aspect was present. The SMT supported and created opportunities for teacher leadership development. In these zones the multiple-leaders perspective was encouraged by the school culture and the SMT. The interaction between the SMT and the three post level one teachers was more democratic, and the interaction structures were flatter. However, in zone three, the multiple-leaders perspective was generally absent and the 'leader-plus' aspect was blurred. The leader-follower-situation interaction, in situations that related to whole school issues (zone three) were more autocratic and the interaction structures were more hierarchical.

5.4 REFLECTIONS ON THE RESEARCH

In this section, I reflect on the appropriateness of both the case study methodology and the analytical model, in answering the research questions. I also review the group project and unfold the challenges and benefits associated with such a project.

5.4.1 The Case Study Methodology

Teacher leadership is an organizational phenomenon (Smylie, 1995) and therefore the enactment of teacher leadership is largely influenced by its context. The case study methodology afforded me the opportunity to be present at the research site and allowed me to examine the 'unit of analysis' namely the three teacher leaders, as well as the contextual factors that mediated the enactment of teacher leadership. I believe that through the case study approach, I was able to capture the true essence of teacher leadership in action. Furthermore, the use of a multi-method approach was appropriate because it reduced the element of subjectivity in the interpretation of data. The validity and trustworthiness of research data is

governed by the notion of ‘fitness for purpose’ (Cohen *et al*, 2007) and I believe that the case study methodology suited the purpose of the research and contributed to the trustworthiness of the study.

5.4.2 The Model as the Analytical Tool

The teacher leadership model was largely a valuable analytical tool. Most of the teacher leadership roles that were identified in the study fitted within the zones and roles represented on the model. The model was useful in that it gave me a holistic perspective of leadership practices within the case study school. Secondly, it illuminated the enactment of teacher leadership by each of the three teacher leaders. Using this model, I was able to describe the comparisons and similarities amongst the teacher leaders, which, I believe, made the data more meaningful.

However, some leadership roles that emerged from the study were not represented in the model. In the model, roles two and three in zone four are restricted to curriculum issues only. Yet, Jane’s leadership role in the community focused more on humanity and social issues rather than on the curriculum. Therefore, I argue that zone four in the model must include another role (role three) that accommodates leadership roles that focus on social issues in the community. Furthermore, whilst, Jane’s role in the ILST aligned itself to leadership in zone three, it did not align itself to any of the two roles (roles five and six) in zone three of the model. These two roles are limited to teacher leaders working only with other teachers in the school and the SMT on whole school issues. Zone three in the model must be extended to include another leadership role pertaining specifically to teacher leaders working with learners at a whole school level. I argue for an expansion of the model to accommodate the array of teacher leadership roles in our country.

5.4.3 The Group Research Project

As discussed in detail in *Chapter Three*, this case study was part of a bigger group research project on the enactment of teacher leadership. I now move on to reflect on the group project and illuminate some of the benefits as well as the challenges of being a member of this group. One of the benefits of working as a group was that we were able to develop our research questions through the combined effort of the group, within six weeks into the teacher leadership module we were studying as part of our first year course work. Secondly, conducting the study in our respective schools elevated the risk of subjectivity and as a group;

we conceded that in order to reduce this subjective element, we had to develop multiple data collection techniques so that we could triangulate the data. As a group we were able to develop seven data collection tools, which, I believe, not only helped to reduce the element of subjectivity but it also gave us a rich data and an in-depth view of teacher leadership in action. Furthermore, throughout the research study, we were a constant source of inspiration and motivation to each other with regard to meeting due dates and dead lines. During our group contact sessions, we each shared our experiences of the research with each other. In a climate of trust and collaboration, devoid of competition, we synchronised as a group, towards one common purpose, giving teacher leadership in South Africa maximum exposure. The only challenge I faced working as a group was that we had to comprise and negotiate on many occasions with regard to dates for contact sessions that were convenient for all of us.

15.5 RECOMMENDATIONS FOR PRACTICE

In this section, I propose a few recommendations to enhance teacher leadership development in schools, based on the findings of this study. The study showed that collaboration was crucial to the development of teacher leadership and therefore it is a recommendation of this study that the SMT deliberately create opportunities for post level one educators to work together in both formal and informal settings towards common goals. Collaboration and teamwork should not be seen “as something done or given by the SMT, but rather as a form of collective leadership where all people in the school can act as leaders at one time or another” (Grant, 2006, p. 529). Similarly, Astin and Astin argue, “Collaboration empowers each individual, engenders trust and capitalises on the diverse talents of the group members” (2000, p. 11).

Secondly, professional development should be site-based in order to contextualise its outcomes. Furthermore, the study found that expert knowledge alone does not optimise the development of teacher leadership. Teacher leadership development requires a combination of both expert knowledge as well as leadership skills. Therefore, it is a recommendation of this study that professional development initiatives focus on the development of expert knowledge as well as leadership skills. Harris and Muijs contend that “capacity building should focus on improving teacher self confidence to lead” (2003, p. 444).

The study also highlighted that time to lead did matter and it is, I believe, the responsibility of the SMT to find innovative and strategic ways of making this time available to teachers. The

study demonstrated how the SMT arranged relief timetable to provide time for the three teachers to lead. Furthermore, the teacher leaders were given reprieves in their teaching loads, but only for leadership roles that were delegated. One strategy to overcome the barrier of time is to avoid a leadership overload phenomenon whereby only a few selected teachers are overburdened by too many leadership roles. In line with this thinking, Barth (1988, p.64) argues, “This type of leadership is divisive because it excludes untried teachers”. Therefore, it is a recommendation of the study that all teachers in an organisation be given opportunities to lead at some point. In addition, leadership roles should match school issues that teachers feel passionate about (Barth, 1988). This recommendation supports the ‘leader-plus’ aspect of distributed leadership (Spillane, 2006) and I argue further that it also reduces the egalitarian ethos associated with teacher leadership since all teachers are given a chance to lead.

The study also noted that the role of the principal seemed to be particularly important in the development of teacher leadership. Therefore, it is a recommendation of the study that ‘strong head teacher leadership’ (Jackson, 2003, xiv) is required for principals to become collaborative, sharing leaders and “recognise that every teacher has the potential to lead” (Astin and Astin, 2000, p.10). If principals want to capitalise on the benefits of teacher leadership, they need to create a school culture that is leadership dense. This type of school culture is synonymous with the “leader- plus aspect of distributed leadership practice” (Spillane, 2006, p.12). It is also a recommendation of this study that school principals, through leadership and management training, build their capacity to promote teacher leadership development. In line with this thinking, Crowther contends that principals “acquire skill and expertise in nurturing teacher leadership” (2002, p.65).

Recognition, incentives and rewards do matter and it is a recommendation of this study that the SMT does not underestimate the powerful influence of these factors in enhancing teacher leadership development. This study demonstrated that incentives such as a decreased teaching load, continuous praise and recognition for work done, improved the self esteem and the confidence of teachers to lead. In support of this idea, Barth explains that “recognition replenishes a teacher, both personally and professionally” (1988, p.64). When teachers are confident, they generally attain success in their leadership roles and their success begets further teacher leadership and success. This in itself sets up the ripple effect enactment of teacher leadership.

Finally, based on the premise that leadership practice can be learnt (Katzenmeyer and Moller, 2001), I propose that a discourse of Teacher Leadership be incorporated into teacher training programmes (for example, the Advance Certificate in Education and the Post Graduate Certificate in Education courses) at Higher Education institutions. A conceptual development of teacher leadership can lead to changes in behaviour (Grant, 2006) and through these Teacher Leadership courses, teachers receive the necessary training for this change agency role and come to view themselves as change agents. The findings of this case study cannot be generalised, yet I do believe that this case study has in some way contributed to closing the gap that exists in teacher leadership literature in South Africa. However, in my quest to seek answers about the enactment of teacher leadership, a range of issues and questions that I believe warrant further research confronted me. In the next part of this chapter, I expose these problematic issues.

5.6 RECOMMENDATIONS FOR FURTHER RESEARCH

The first problematic issue that arose in the study was centred on the concept of ‘consultation’. While teachers claimed that they were consulted on and participated in school level decision-making, the study questions the depth and the intensity of the participation. Is participation accompanied by a complete devolution of power through the organisation or is it a mere tokenism of democratic participation? Whatever the case may be it was beyond the scope of this study to interrogate, what type of consultation takes place, and how this happens. Therefore I argue that further study need to be conducted to explore this problematic issue.

The study also brought to the fore the following question: is teacher leadership development more progressive in affluent schools as compared to non affluent schools? If this is indeed the situation, then what are the factors that contribute to this state of affairs? Is the practice of teacher leadership like most educationally sound practices only affordable to the rich affluent schools? How can teacher leadership development be promoted in non-affluent schools? The study also highlighted that remuneration, incentives and rewards do matter in the take-up of leadership roles. These issues and their link to teacher leadership warrant the need for additional research to examine the extent to which incentives and rewards enhance teacher leadership development.

Finally at the heart of this study lies the notion of the ripple effect of teacher leadership. Was this ripple effect unique to the teacher leaders in this particular case study, or can this ripple

effect of teacher leadership manifest itself in another context with another group of teacher leaders? I believe further research aimed at exploring this ripple effect is warranted since it might hold some important lessons for the enhancement of teacher leadership development in South Africa.

5.7 CONCLUSION

The conceptual understanding of teacher leadership is still in its infancy stages in South Africa. Of even greater concern is that the practice of teacher leadership is not deeply rooted in the culture of many of the country's schools. This small scale qualitative research was an attempt to illuminate the practice of teacher leadership in a semi-urban secondary school in KwaZulu-Natal. It emerged from the study that although an individual teacher's belief systems and skills affects her ability to lead, the context of the school is still central to her success. This confirms the view of Katzenmeyer and Moller, (2001) that the success of teacher leadership is largely dependant on the context in which it takes place. Teachers take on leadership roles because they want to expand their influence and they want to promote their professional growth. The different teacher leadership roles that an individual teacher takes on are interconnected and influence each other resulting in a ripple effect enactment of teacher leadership. This, I believe, allows teacher leadership to take on a holistic perspective in that attaining success in teacher leadership roles begets more teacher leadership. Is teacher leadership a self-fulfilling prophecy? Empirical evidence from this study suggests that it is. In addition to the empirical evidence, research literature on teacher leadership has suggested that teacher leadership revitalises the teaching profession and offers a new professionalism based on mutual trust, empowerment and support (Harris and Muijs, 2003).

It follows then that if schools are to become effective learning organisations, then leadership should not be the sole enterprise of the principal but should rather be vested in a community of leaders (Barth 1988). Spillane (2006) echoes similar sentiments when he argues that leadership is a group practice and that school structures and cultures should support the practice of having multiple leaders. Finally, this study has argued that, "teacher leadership reclaims school leadership from the individual to the collective and offers the real possibility of distributed leadership in action" (Gronn, 2002, p.333). Teacher leadership is essential for the complex changes that our schools face. Therefore, I believe that further empirical research on teacher leadership is an urgent priority in South Africa.

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APPENDIX 1
TEACHER LEADERSHIP IN ACTION 2008 - 2009
SCHOOL OBSERVATION SCHEDULE

1. Background information on the school

- Name of the school
- Number of learners
- Number of teachers
- Number on SMT
- School Quintile
- Subjects offered
- What is the medium of instruction
- Pass rate 2005_____ 2006_____ 2007_____ 2008_____
- Classrooms: Block___ Bricks___ Prefab___ Mud___ Other _____
- Does the school have the following:

| List | Yes (Describe) | No |
|---------------------|----------------|----|
| ○ Library | ○ | ○ |
| ○ Laboratory | ○ | ○ |
| ○ Sports facilities | ○ | ○ |
| ○ Soccer field | ○ | ○ |
| ○ netball field | ○ | ○ |
| ○ tennis court | ○ | ○ |
| ○ cricket field | ○ | ○ |

- School fence
- School fees per annum
- Does your school fund raise
- List your fundraising activities
- School attendance : Poor___ Regular___ Satisfactory___ Good___ Fair___ Excellent___
- What is the average drop-out rate per year:
- Possible reasons for the drop out:
- Does the school have an admission policy:
- Is the vision and mission of the school displayed
- What is the furthest distance that learners travel to and from school
- Have there been any evident changes in your community after 1994.

2. Staffing

- Staff room- notices (budget), seating arrangements
- Classroom sizes
- Pupil-teacher ratio
- Offices- who occupies etc
- Staff turnover- numbers on a given day
- School timetable visibility
- Assemblies- teachers' roles
- Unionism-break-time, meetings
- Gender-roles played, numbers in staff
- Age differences between staff members
- Years of service of principal at the school
- Professional ethos- punctuality, discipline, attendance, general behaviour.

3. Curriculum: What teaching and learning is taking place at the school?

- Are the learners supervised?
- Is active teaching and learning taking place?
- Are the learners loitering? Reasons?
- What is the general practice of teaching – teacher or learner centred?
- What subjects are taught?
- Is there a timetable?
- Do learners or teachers rotate for lessons?
- Has the school responded to national/provincial changes?
- Is the classroom conducive to teaching and learning?
- Is there evidence of cultural and sporting activities?
- How are these organized and controlled?
- Is there evidence of assessment and feedback based on assessment?
- Evidence of teacher collaboration in the same learning area?
- Is homework given and how often is it marked?
- Are learners encouraged to engage in peer teaching or self-study after school hours?

4. Leadership and decision-making, organisational life of the school.

- Is there a welcoming atmosphere on arrival?
- Is the staff on first name basis?
- How does leadership relate to staff and learners?
- What structures are in place for staff participation?
- What admin systems are visible?
- What type of leadership and management style is evident?
- Is the leadership rigid or flexible?
- Are teachers involved in decision-making?
- Is there a feeling of discipline at the school?
- How would you describe the ethos of the school?
- Are teachers active in co and extra curricular activities?
- Is there an active and supportive governing body?
- Is the educator rep on the SGB active in the decision making process?
- Are teachers active on school committees?
- Do teachers take up leadership positions on committees?
- Working relationship between the SGB and staff?
- Is the governing body successful?
- Is there evidence of student leadership?
- Relationship between the SGB and the community?
- How does the governing body handle school problems?

5. Relationships with Education department and other outside authorities

- Are there any documents signed by the Department officials during their school visits? e.g. log book
- Is there a year planner, list of donors, contact numbers e.g. helpline, department offices etc.?
- Is there any evidence pertaining to the operation of the school eg. Minute books and attendance registers?

APPENDIX 2
TEACHER LEADERSHIP IN ACTION 2008 - 2009

TEACHER QUESTIONNAIRE

INSTRUCTIONS FOR QUESTIONNAIRE

- Use a **BLACK** or **BLUE** ink pen. Please do not use a pencil.

- In the interests of confidentiality, you are not required to supply your name on the questionnaire.

- Please respond to each of the following items by placing a **CROSS**, which correctly reflects your opinion and experiences on the role of teacher leadership in your school.

- This questionnaire is to be answered by an educator.¹

¹ The word 'educator' refers to a post level 1 educator

A. BIOGRAPHICAL INFORMATION

1. Gender

| | | | |
|------|--|--------|--|
| Male | | Female | |
|------|--|--------|--|

2. Age

| | | | | | | | |
|-------|--|-------|--|-------|--|-----|--|
| 21-30 | | 31-40 | | 41-50 | | 51+ | |
|-------|--|-------|--|-------|--|-----|--|

3. Your formal qualification is:

| | | | | | | | |
|-----------|--|-----|--|-----|--|---------------|--|
| Below M+3 | | M+3 | | M+4 | | M+5 and above | |
|-----------|--|-----|--|-----|--|---------------|--|

4. Nature of employment

| | | | | | |
|-----------|--|-----------|--|----------|--|
| Permanent | | Temporary | | Contract | |
|-----------|--|-----------|--|----------|--|

5. Employer

| | | | |
|-------|--|-----|--|
| State | | SGB | |
|-------|--|-----|--|

6. Years of teaching experience

| | | | | | | | |
|--------|--|---------|--|----------|--|--------|--|
| 0-5yrs | | 6-10yrs | | 11-15yrs | | 16+yrs | |
|--------|--|---------|--|----------|--|--------|--|

B. TEACHER LEADERSHIP SURVEY

Instruction: Place a CROSS in the column that most closely describes your opinion on the role of teacher leadership in your school.

Scale: 4= Strongly Agree 3=Agree 2= Disagree 1= Strongly disagree

B. 1

| I believe: | 4 | 3 | 2 | 1 |
|---|---|---|---|---|
| 7. Only the SMT should make decisions in the school. | | | | |
| 8. All educators ² can take a leadership role in the school. | | | | |
| 9. That only people in positions of authority should lead. | | | | |
| 10. That men are better able to lead than women | | | | |

B. 2

| Which of the following tasks are you involved with? | 4 | 3 | 2 | 1 |
|---|---|---|---|---|
| 11. I take initiative without being delegated duties. | | | | |
| 12. I reflect critically on my own classroom teaching. | | | | |
| 13. I organise and lead reviews of the school year plan. | | | | |
| 14. I participate in in-school decision making. | | | | |
| 15. I give in-service training to colleagues. | | | | |
| 16. I provide curriculum development knowledge to my colleagues. | | | | |
| 17. I provide curriculum development knowledge to teachers in other schools | | | | |
| 18. I participate in the performance evaluation of teachers. | | | | |
| 19. I choose textbook and instructional materials for my grade/learning area. | | | | |

| | | | | |
|--|--|--|--|--|
| 20. I co-ordinate aspects of the extra-mural activities in my school. | | | | |
| 21. I co-ordinate aspects of the extra-mural activities beyond my school. | | | | |
| 22. I set standards for pupil behaviour in my school. | | | | |
| 23. I design staff development programmes for my school. | | | | |
| 24. I co-ordinate cluster meetings for my learning area. | | | | |
| 25. I keep up to date with developments in teaching practices and learning area. | | | | |
| 26. I set the duty roster for my colleagues. | | | | |

Instruction: Please respond with a CROSS either Yes/ No/ Not applicable, to your involvement in each committee.
If YES, respond with a CROSS by selecting ONE option between: Nominated by colleagues, Delegated by SMT or Volunteered.

B.3

| | | | | How I got onto this committee: | | |
|---|------------|-----------|-----------------------|---------------------------------------|------------------|-------------|
| I play a leadership role in the following committee/s: | Yes | No | Not applicable | Nominated by colleagues | Delegated by SMT | Volunteered |
| 27. Catering committee | | | | | | |
| 28. Sports committee | | | | | | |
| 29. Bereavement /condolence committee. | | | | | | |
| 30. Cultural committee. | | | | | | |
| 31. Library committee. | | | | | | |
| 32 Subject/ learning area committee. | | | | | | |
| 33 Awards committee | | | | | | |
| 34 Time- table committee. | | | | | | |
| 35. SGB (School Governing Body) | | | | | | |
| 36. SDT (School Development Team) | | | | | | |
| 37. Fundraising committee. | | | | | | |
| 38. Maintenance committee. | | | | | | |
| 39. Safety and security committee. | | | | | | |
| 40. Discipline committee | | | | | | |
| 41. Teacher Union | | | | | | |
| 42. Assessment committee | | | | | | |
| 43. Admission committee | | | | | | |
| 44. Other (Please specify) | | | | | | |

Instruction: Place a CROSS in the column that most closely describes your opinion on what factors support or hinder teacher leadership.

Scale: 4= Strongly Agree 3= Agree 2= Disagree 1= Strongly Disagree

B.4

| My school is a place where: | 4 | 3 | 2 | 1 |
|---|----------|----------|----------|----------|
| 45 The SMT has trust in my ability to lead. | | | | |
| 46. Teachers resist leadership from other teachers. | | | | |

| | | | | |
|---|--|--|--|--|
| 47. Teachers are allowed to try out new ideas. | | | | |
| 48. The SMT (School Management Team) values teachers' opinions. | | | | |
| 49. The SMT allows teachers to participate in school level decision-making. | | | | |
| 50. Only the SMT takes important decisions. | | | | |
| 51. Only the SMT takes initiative in the school. | | | | |
| 52. Adequate opportunities are created for the staff to develop professionally. | | | | |
| 53. Team work is encouraged. | | | | |
| 54. Men are given more leadership roles than women. | | | | |

D. Teacher Leadership: Open-ended questions

1. What is your understanding of teacher leadership? Please explain.

2. Have you ever been involved in leading in any school related activity, which is outside your classroom? If so, please give examples of your teacher leadership.

3. In your opinion what hinders the development of teacher leadership in the context of your school? Please discuss.

4. In your opinion what are the benefits to teacher leadership in the context of your school? Please discuss.

Thank you for your time and effort!

APPENDIX 3
TEACHER LEADERSHIP IN ACTION 2008 - 2009

SMT QUESTIONNAIRE

INSTRUCTIONS FOR QUESTIONNAIRE

- Use a **BLACK** or **BLUE** ink pen. Please do not use a pencil.

- In the interests of confidentiality, you are not required to supply your name on the questionnaire.

- Please respond to each of the following items by placing a **CROSS**, which correctly reflects your opinion and experiences on the role of teacher leadership in your school.

- This questionnaire is to be answered by a member of the School Management Team (SMT).

A. BIOGRAPHICAL INFORMATION

1. Gender

| | |
|------|--------|
| Male | Female |
|------|--------|

2. Age

| | | | |
|-------|-------|-------|-----|
| 21-30 | 31-40 | 41-50 | 51+ |
|-------|-------|-------|-----|

3. Your formal qualification is:

| | | | |
|-----------|-----|-----|---------------|
| Below M+3 | M+3 | M+4 | M+5 and above |
|-----------|-----|-----|---------------|

4. Nature of employment

| | | |
|-----------|-----------|--------|
| Permanent | Temporary | Acting |
|-----------|-----------|--------|

5. Years of teaching experience

| | | | |
|--------|---------|----------|--------|
| 0-5yrs | 6-10yrs | 11-15yrs | 16+yrs |
|--------|---------|----------|--------|

6. Period of service in current position

| | | | |
|--------|---------|----------|--------|
| 0-5yrs | 6-10yrs | 11-15yrs | 16+yrs |
|--------|---------|----------|--------|

B. SCHOOL INFORMATION

7. Learner Enrolment of your school

| | | |
|-------|---------|------|
| 1-299 | 300-599 | 600+ |
|-------|---------|------|

8. Number of educators, including management, in your school

| | | | | |
|------|-------|-------|-------|-----|
| 2-10 | 11-19 | 20-28 | 29-37 | 38+ |
|------|-------|-------|-------|-----|

9. School type

| | | |
|---------|-----------|----------|
| Primary | Secondary | Combined |
|---------|-----------|----------|

10. School Fees

| | | | | |
|---------|---------|------------|-------------|--------|
| No Fees | R1-R500 | R501-R1000 | R1001-R5000 | R5001+ |
|---------|---------|------------|-------------|--------|

C. TEACHER LEADERSHIP SURVEY

Instruction: Place a CROSS in the column that most closely describes your opinion on the role of teacher leadership in your school.

Scale 4= Strongly agree 3= Agree 2= Disagree 1= Strongly Disagree

C. 1

| I believe: | 4 | 3 | 2 | 1 |
|--|---|---|---|---|
| 11. Only the SMT should make decisions in the school. | | | | |
| 12. All teachers should take a leadership role in the school. | | | | |
| 13. That only people in formal positions of authority should lead. | | | | |

| | | | | |
|--|--|--|--|--|
| 14. That men are better able to lead than women | | | | |
| 15. Educators ³ should be supported when taking on leadership roles | | | | |

Instruction: Place a CROSS in the column that most closely describes your opinion on the role of teacher leadership in your school.

Scale 4= Strongly agree 3= Agree 2= Disagree 1= Strongly disagree

C.2

| Which of the following tasks are you involved with? | 4 | 3 | 2 | 1 |
|--|---|---|---|---|
| 16. I work with other educators in organising and leading reviews of the school year plan | | | | |
| 17. I encourage educators to participate in in-school decision making | | | | |
| 18. I support educators in providing curriculum development knowledge to other educators | | | | |
| 19. I support educators in providing curriculum development knowledge to educators in other schools | | | | |
| 20. I provide educators with opportunity to choose textbooks and learning materials for their grade or learning area | | | | |
| 21. I work with other educators in designing staff development programme for the school | | | | |
| 22. I include other educators in designing the duty roster | | | | |
| | | | | |

Instruction: Place a CROSS in the column that most closely describes your opinion on what factors support or hinder teacher leadership.

Scale: 4= strongly agree 3= Agree 2= Disagree 1= strongly disagree

C.3

| My school is a place where: | 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|---|
| 23. The SMT has trust in educator's ability to lead. | | | | | |
| 24. Educators are allowed to try out new ideas. | | | | | |
| 25. The SMT (School Management Team) values teachers' opinions. | | | | | |
| 26. The SMT allows teachers to participate in school level decision-making. | | | | | |
| 27. Only the SMT takes important decisions. | | | | | |
| 28. Only the SMT takes initiative in the school. | | | | | |
| 29. Adequate opportunities are created for the staff to develop professionally. | | | | | |
| 30. Team work is encouraged. | | | | | |
| 31. Men are given more leadership roles than women. | | | | | |

D. Teacher Leadership: Open-ended questions

1. What is your understanding of teacher leadership? Please explain.

2. Have you ever encouraged educators in leading in any school related activity, which is outside their classrooms? If so, please give example

3. In your opinion what hinders the development of teacher leadership in the context of your school? Please discuss.

5. In your opinion what promotes the development of teacher leadership in the context of your school? Please discuss.

Thank you for your time and effort!

APPENDIX 4
TEACHER LEADERSHIP IN ACTION 2008 - 2009

TEACHER LEADERSHIP OBSERVATION SCHEDULE
(BORROWED FROM HARRIS & LAMBERT, 2003)

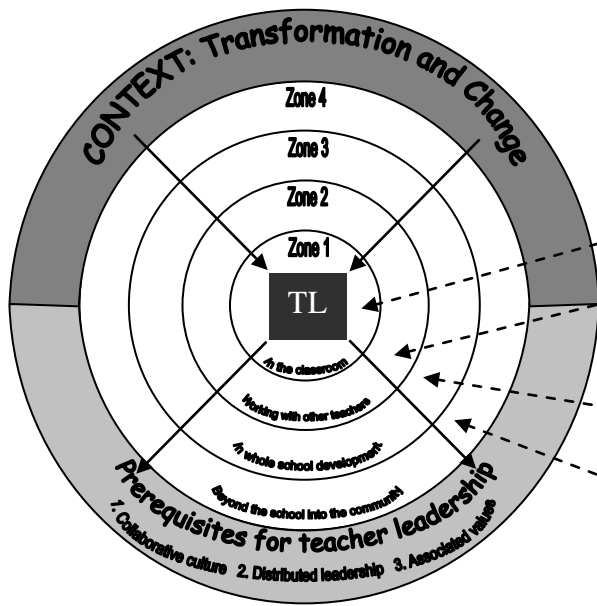
| | | | |
|--|--|---|---|
| A. Adult Development | | | |
| 1. Defines self in relation to others in the community. The opinions of others, particularly those in authority, are highly important. | Defines self as independent from the group, separating needs and goals from others. Does not often see the need for group action. | Understands self as interdependent with others in the school community, seeking feedback from others and counsel from self. | Engages colleagues in acting out of a sense of self and shared values, forming interdependent learning communities. |
| 2. Does not yet recognise the need for self-reflection. Tends to implement strategies as learnt without making adjustments arising from reflective practice. | Personal reflection leads to refinement of strategies and routines. Does not often share reflections with others. Focuses on argument for own ideas. Does not support systems which are designed to enhance reflective practice. | Engages in self-reflection as a means of improving practices. Models these processes for others in the school community. Holds conversations that share views and develops understanding of each other's assumptions. | Evokes reflection in others. Develops and supports a culture for self-reflection that may include collaborative planning, peer coaching, action research and reflective writing. |
| 3. Absence of ongoing evaluation of their teaching. Does not yet systematically connect teacher and student behaviours. | Self-evaluation is not often shared with others; however, responsibility for problems or errors is typically ascribed to others such as students or family. | Highly self-evaluative and introspective. Accepts shared responsibility as a natural part of a school community. No need for blame. | Enables others to be self-evaluative and introspective, leading towards self- and shared responsibility. |
| 4. In need of effective strategies to demonstrate respect and concern for others. Is polite yet primarily focuses on own needs. | Exhibits respectful attitude towards others in most situations, usually privately. Can be disrespectful in public debate. Gives little feedback to others. | Consistently shows respect and concern for all members of the school community. Validates and respects qualities in and opinions of others. | Encourages & supports others in being respectful, caring, trusted members of the school community. Initiates recognition of ideas and achievements of colleagues as part of an overall goal of collegial empowerment. |
| B. Dialogue | | | |
| 1. Interactions with others are primarily social, not based on common goals or group learning. | Communicates with others around logistical issues/problems. Sees goals as individually set for each classroom, not actively participating in efforts to focus on common goals. | Communicates well with individuals and groups in the community as a means of creating & sustaining relationships and focusing on teaching and learning. Actively participates in dialogue. | Facilitates effective dialogue among members of the school community in order to build relationships and focus dialogue on teaching and learning. |
| 2. Does not pose questions of or seek to influence the group. Participation often resembles consent or compliance. | Makes personal point of view, although not assumptions, explicit. When opposed to ideas, often asks impeding questions which can derail or divert dialogue. | Asks questions and provides insights that reflect an understanding of the need to surface assumptions and address the goals of the community. | Facilitates communication among colleagues by asking provocative questions which open productive dialogue. |
| 3. Does not actively seek information or new | Attends staff development activities | Possesses current knowledge and | Works with others to construct knowledge |

| | | | |
|--|--|---|---|
| professional knowledge which challenges current practices. Shares knowledge with others only when requested. | planned by the school or district. Occasionally shares knowledge during informal & formal gatherings. Does not seek knowledge that challenges status quo. | information about teaching and learning. Actively seeks to use that understanding to alter teaching practices. Studies own practice. | through multiple forms of enquiry, action research, examination of disaggregated school data, insights from others & from outside research community. |
| 4. Responds to situations in similar ways; expects predictable responses from others. Is sometimes confused by variations from expected norms. | Responds to situations in different, although predictable ways. Expects consistency from those in authority and from self. | Responds to situations with an open mind and flexibility; welcomes multiple perspectives from others. Alters own assumptions during dialogue when evidence is persuasive. | Promotes an open mind and flexibility in others; invites multiple perspectives and interpretations as a means of challenging old assumptions and framing new actions. |
| C. Collaboration | | | |
| 1. Decision making is based on individual wants and needs rather than those of the group as a whole. | Promotes individual autonomy in classroom decision making. Relegates school decision-making to the principal. | Actively participates in shared decision-making. Volunteers to follow through on group decisions. | Promotes collaborative decision-making that provides options to meet the diverse individual and group needs of the school community. |
| 2. Sees little value in team building, although seeks membership in the group. Will participate, although does not connect activities with larger school goals. | Doesn't seek to participate in roles or settings that involve team building. Considers most team building activities to be 'touchy-feely' and frivolous. | Is an active participant in team building, seeking roles and opportunities to contribute to the work of the team. Sees teamness' as central to community. | Engages colleagues in team-building activities that develop mutual trust and promotes collaborative decision-making. |
| 3. Sees problems as caused by the actions of others, e.g. students, parents; or blames self. Uncertain regarding the specifics of one's own involvement. | Interprets problems from own perspective. Plays the role of observer and critic, not accepting responsibility for emerging issues and dilemmas. Considers most problems to be a function of poor management. | Acknowledges that problems involve all members of the community. Actively seeks to define problems and proposes resolutions or approaches which address the situation. Finding blame is not relevant. | Engages colleagues in identifying and acknowledging problems. Acts with others to frame problems and seek resolutions. Anticipates situations which may cause recurrent problems. |
| 4. Does not recognise or avoids conflict in the school community. Misdirects frustrations into withdrawal or personal hurt. Avoids talking about issues that could evoke conflict. | Does not shy away from conflict. Engages in conflict as a means of surfacing competing ideas, approaches. Understands that conflict is intimidating to many. | Anticipates and seeks to resolve or intervene in conflict. Actively tries to channel conflict into problem-solving endeavours. Is not intimidated by conflict, though wouldn't seek it. | Surfaces, addresses and mediates conflict within the school and with parents and community. Understands that negotiating conflict is necessary for personal and school change. |
| D. Organisational change | | | |
| 1. Focuses on present situations and issues; seldom plans for either short or long term futures. Expects certainty. | Demonstrates forward thinking for own classroom. Usually does not connect own planning to the future of the school. | Develops forward thinking skills in working with others and planning for school improvements. Future goals based on common values and vision. | Provides for and creates opportunities to engage others in forward (visionary) thinking and planning based on common core values. |
| 2. Maintains a low profile during school change, basically uninvolved in group processes. Attempts to | Questions status quo; suggests that others need to change in order to improve it. Selects those changes which reflect | Shows enthusiasm and involvement in school change. Leads by example. Explores possibilities and | Initiates action towards innovative change; motivates, draws others into action for school & district improvements. |

| | | | |
|--|--|--|--|
| comply with changes. Expects compliance from others. | personal philosophies. Opposes or ignores practices which require a school-wide focus. | implements changes for both personal and professional development. | Encourages others to implement practices which support school-wide learning. Provides follow-up planning and coaching support. |
| 3. Culturally unaware. 'I treat everyone the same'. Stage of naivety to socio-political implications of race, culture, ethnic and gender issues. | Growing sensitivity to political implications of diversity. Acknowledges that cultural differences exist and influence individuals and organisations. | Understanding and acceptance: 'aha' level. Has developed an appreciation of own cultural identities and a deeper appreciation / respect for cultural differences. Applies understanding in classroom and school. | Commitment to value of and build on cultural differences. Actively seeks to involve others in designing programmes and policies which support the development of a multi-cultural world. |
| 4. Attends to students in his or her own classroom. Possessive of children and space. Has not yet secured a developmental view of children. | Concerned for the preparation of children in previous grades. Critical of preparation of children and readiness of children to meet established standards. | Developmental view of children translates into concern for all children in the school (not only those in own classroom) and their future performances in further educational settings. | Works with colleagues to develop programmes, policies that take holistic view of children's development (e.g. multi-graded classes, parent education, follow-up studies). |
| 5. Works alongside new teachers, is cordial although does not offer assistance. Lacks confidence in giving feedback to others. | Shares limited information with new teachers, mainly that pertaining to school admin functions (e.g. attendance accounting, grade reports). Does not offer to serve as master teacher. | Collaborates with, supports and gives feedback to new and student teachers. Often serves as master teacher. | Takes responsibility for support & development of systems for student & new teachers. Develops collaborative programmes with school, district and universities. |
| 6. Displays little interest in the selection of new teachers. Assumes that they will be appointed by the district or those otherwise in authority. | Assumes that district will recruit and appoint teachers. Has not proposed a more active role to the teacher association. | Becomes actively involved in the setting of criteria and the selection of new teachers. | Advocates to schools, districts and teachers' association the development of hiring practices that involve teachers, parents and students in processes. Promotes the hiring of diversity candidates. |

APPENDIX 5.1 TEACHER LEADERSHIP IN ACTION: 2008 – 2009

ZONES AND ROLES MODEL OF TEACHER LEADERSHIP (Grant, 2008)



TEACHER LEADERSHIP

**First level of analysis:
Four Zones**

**Second level of analysis:
Six Roles**

| | |
|--------------|---|
| One | One: Continuing to teach and improve one's own teaching |
| Two | Two: Providing curriculum development knowledge |
| Three | Three: Leading in-service education and assisting other teachers |
| Four | Four: Participating in performance evaluation of teachers |
| Five | Five: Organising and leading peer reviews of school practice |
| Six | Six: Participating in school level decision-making |
| Seven | Seven: Providing curriculum development knowledge |
| Eight | Eight: Leading in-service education and assisting other teachers |

APPENDIX 5.2

ANALYTICAL FRAMEWORK FOR TEACHER LEADERSHIP

| Zones | Roles | Indicators |
|-------|--|---|
| 1. | 1. Continuing to teach and improve one's own teaching in the classroom | <ol style="list-style-type: none"> 1. centrality of expert practice (including appropriate teaching and assessment strategies and expert knowledge) 2. keep abreast of new developments (attendance at workshops & further study) for own professional development 3. design of learning activities and improvisation/appropriate use of resources 4. processes of record keeping and reflective practice 5. engagement in classroom action research 6. maintain effective classroom discipline and meaningful relationship with learners (evidence of pastoral care role) 7. take initiative and engage in autonomous decision-making to make change happen in classroom to benefit of learners |
| 2. | 2. Providing curriculum development knowledge (in own school) | <ol style="list-style-type: none"> 1. joint curriculum development (core and extra/co curricular) 2. team teaching 3. take initiative in subject committee meetings 4. work to contextualise curriculum for own particular school 5. attend DOE curriculum workshops and take new learning, with critique, back to school staff 6. extra/co curricular coordination (e.g. sports, cultural activities etc) |
| 2. | 3. Leading in-service education and assisting other teachers (in own school) | <ol style="list-style-type: none"> 1. forge close relationships and build rapport with individual teachers through which mutual learning takes place 2. staff development initiatives 3. peer coaching 4. mentoring role of teacher leaders (including induction) 5. building skills and confidence in others 6. work with integrity, trust and transparency |
| 2. | 4. Participating in performance evaluation of teachers (in own school) | <ol style="list-style-type: none"> 1. engage in IQMS activities such as peer assessment (involvement in development support groups) 2. informal peer assessment activities 3. moderation of assessment tasks 4. reflections on core and co/extra curricular activities |
| 3. | 5. Organising and leading peer reviews of school practice (in own school) | <ol style="list-style-type: none"> 1. organisational diagnosis (Audit – SWOT) and dealing with the change process (School Development Planning) 2. whole school evaluation processes 3. school based action research 4. mediating role (informal mediation as well as union representation) 5. school practices including fundraising, policy development, staff development, professional development initiatives etc) |
| 3. | 6. Participating in school level decision-making (in own school) | <ol style="list-style-type: none"> 1. awareness of and non-partisan to micropolitics of school (work with integrity, trust and transparency) 2. participative leadership where all teachers feel part of the change or development and have a sense of ownership 3. problem identification and resolution 4. conflict resolution and communication skills 5. school-based planning and decision-making |
| 4. | 2. Providing curriculum development knowledge(across schools into community) | <ol style="list-style-type: none"> 1. joint curriculum development (core and extra/co curricular) 2. liaise with and empower parents about curriculum issues (parent meetings, visits, communication – written or verbal) 3. liaise with and empower the SGB about curriculum issues (SGB meetings, workshops, training – influencing of agendas) 4. networking at circuit/district/regional/provincial level through committee or cluster meeting involvement |
| 4. | 3. Leading in-service education and assisting other teachers (across schools into community) | <ol style="list-style-type: none"> 1. forge close relationships and build rapport with individual teachers through which mutual learning takes place 2. staff development initiatives 3. peer coaching 4. mentoring role of teacher leaders (including induction) 5. building skills and confidence in others 6. work with integrity, trust and transparency |

APPENDIX 6
TEACHER LEADERSHIP IN ACTION: 2008 – 2009
TEACHER LEADER JOURNAL ENTRIES

Journal Entry 1 (Week 3 October 2008)

Please would you fill in this information in your journal and bring to the focus group interview next week. This information will provide me with background information about the social context of your school and it will help me to get to know you a little better. Please be as honest as you can! I will ensure your anonymity at all times.

About your school:

1. What kind of school is it? (level/ resources/diversity/ size etc)
2. Describe the socio-economic backgrounds of the learners in the school and the surrounding community?
3. How would you describe the culture of your school; in other words, 'the way things are done around here'?

About you:

1. Name
2. Age
3. Gender
4. Years of experience as a teacher
5. Qualification
6. Which subjects do you teach and which grades?
7. Do you enjoy teaching? Yes/No/Mostly/Occasionally. Why do you say so?
8. Describe your family to me.

Think about yourself as a teacher leader:

1. What do you understand the term 'teacher leader' to mean?
2. Describe at least two examples of situations where you work as a teacher leader in your school.

Journal Entry 2 (1st half of November 2008)

Think about a memory (strongly positive or strongly negative) you have when, as a teacher, you led a new initiative in your classroom or school.

1. Tell the story by describing the situation and explaining the new initiative.
2. How did leading this initiative initially make you feel?
3. What was the response to your leadership (either good or bad)?
4. How did this response make you feel?

Journal Entry 3 (2nd half of November 2008)

Think about the forth term of school. It is often described as a term of learner assessment and examination.

1. Describe the different situations where you have worked as a teacher leader. What were the leadership roles you filled? What did you do?
2. How did your leadership impact on others? What was the response from your SMT? What was the response from the teachers?
3. How did being a teacher leader in these situations make you feel?

Journal Entry 4 (1st half of February 2009)

1. Think about yourself as a teacher leader and the personal attributes you have that make you a teacher leader.

- i. List these personal attributes.
- ii. Why do you think these particular attributes are important in developing teacher leaders?
- iii. Are there any other attributes you think are important and which you would like to develop to make you an even better teacher leader?

2. Think about yourself as a teacher leader and the knowledge and skills you have that make you a teacher leader.

- i. List the skills and knowledge you have.
- ii. Why do you think this knowledge and these skills are important in developing teacher leaders?
- iii. Are there any other skills/knowledge you think are important and which you would like to develop to make you an even better teacher leader?

Journal Entry 5 (2nd half of February 2009)

Think about the first term of school. It is often described as a term of planning, especially around curriculum issues.

1. Describe the different situations where you have worked as a teacher leader during this term. What were the leadership roles you filled? What did you do?
2. How did your leadership impact on others? What was the response from your SMT? What was the response from the teachers?
3. How did being a teacher leader in these situations make you feel?

Journal Entry 6 (1st half of March 2009)

Think now about your experience as a teacher leader and ponder on the barriers you have come up against.

1. Describe some of these barriers.
2. What are the reasons for these barriers, do you think?
3. How do you think these barriers can be overcome?
4. How do you think teacher leadership can be promoted?

Journal Entry 7 (2nd half of March 2009)

1. Can you tell a story / describe a situation in each of the following contexts when you worked as a teacher leader:

- i) in your classroom
- ii) working with other teachers in curricular/extra-curricular activities
- iii) in school-wide issues
- iv) networking across schools or working in the school community

2. You have come to the end of your journaling process. Please feel free now to:

- i) ask me any questions
- ii) raise further points
- iii) reflect on the writing process
- iv) reflect on the research process as a whole

APPENDIX 7
TEACHER LEADERSHIP IN ACTION: 2008 – 2009
TEACHER LEADER FOCUS GROUP INTERVIEW

1. What does the word leadership mean to you?
2. Participant 2, how do you feel about leadership?
3. Participant 3, what do you think about leadership?
4. What does the word “teacher leadership” mean to you?
5. Do you believe that a teacher can be a leader despite anyone delegating duties them?
6. When you think of yourself as a teacher leader, what emotions are conjured up? Why do you think you feel this way. In addition, what do you think are the cause of these emotions?
7. Do you feel that the ideas you get support for are the trivial ones?
8. How do you feel about the issue of trust in allowing you to take on teacher leader duties?.
9. Think about teacher leadership in the perfect school what would a teacher leader be able to achieve and what support would teacher leaders have?.
10. Why do you need to have a positive relationship with all stakeholders?
11. When you talk about support what would you envisage the headship and the management to be in an ideal school, where you can be an optimum teacher leader what sort of management do you think you need?
12. Do you think your school is a perfect school?
13. Do you think you would get a perfect school anywhere?
14. In terms of me the researcher being in the same school did it restrict you in any way?

APPENDIX 8.1
TEACHER LEADERSHIP IN ACTION: 2008 – 2009

INDIVIDUAL TEACHER LEADERSHIP INTERVIEW SCHEDULE:MARY

1. What do you think are the personal attributes of teacher leaders?
2. When you talk about confidence, why do you think this characteristic is important?
3. You seem to have more passion for some leadership roles as compared to the others do you agree and why?
4. What other characteristics do you think they should have, because they are working without any title, official title?
5. Tolerant, in what way?
6. What zones and roles of teacher leadership have you engaged in?
7. So, do you see yourself as a curriculum developer?
8. This cluster coordinator role, Did you volunteer, were you nominated or delegated the duty?
9. Do you think teacher leaders can be zoned into the community?
10. Have you taken on any leadership roles in the community?
11. What are some of the barriers you as a teacher leader have experienced?
12. If there was something you really wanted to do, how would you get staff buy in and how would you overcome the resistance?
13. Any other factors especially in your school context, that you see as a barrier to you taking on leadership roles?
14. In your school culture and the leadership in the school, which one is easier for you? When you delegated those teacher leadership roles or when you initiate it yourself?
15. How does this form a barrier to you as a teacher leader? Give me an example, that you have experienced yourself.
16. How do you manage to stay ahead of the rest of teachers, so you are still

APPENDIX 8.2
TEACHER LEADERSHIP IN ACTION: 2008 – 2009

INDIVIDUAL TEACHER LEADERSHIP INTERVIEW SCHEDULE:JEN

1. What do you think are the personal attributes of teacher leaders?
2. You mention something about “moving from the old to the new” Could you elaborate on that?
3. You also mentioned something about being a “People Person”. Why do you think that is important in being a teacher leader?
4. You also mentioned something about teacher leadership being able to articulate her vision. Why do you think that this is important and what do you understand by the word articulate?
5. What are some of the zones that you have engaged yourself in and the roles that you have participated in as a teacher leader?
6. What roles have you played in school that you would consider activities of teacher leadership? Give me examples.
7. Can you briefly outline what some of the main barriers that teacher leaders experience and in particular, barriers you have experienced when trying to lead any initiative in your particular school context?
8. Considering that teacher leaders in any leadership position takes up, requires a lot of time, sacrifice and effort. Would you not consider time to be one of the barriers? Have you had any experience, where, when you were carrying out teacher leader roles that time was a barrier for you?
9. You spoke about the time issue, in terms of your religious activities and although it has taken up your time, why do you do it?
10. In your school context, delegated leadership duties, or those that you initiate on your own which one have you found to be easier to carry out and why?

APPENDIX: 8.3
TEACHER LEADERSHIP IN ACTION: 2008 – 2009

INDIVIDUAL TEACHER LEADERSHIP INTERVIEW SCHEDULE:JANE

1. What do you think are the personal attributes of teacher leaders?
2. When you talk about being self-motivated, give me an example of that?
3. Can you give me examples of these activities?
4. Why do you need to get these people's buy in, why is it important?
5. Why do you think being able to take risks and being courageous are an important characteristics of teacher leadership?
6. When you talk about workshops and seminars, in neighbouring schools as well?.
7. Why do you think workshops and seminars are important activities of teacher leadership?.
8. Do you think teacher leaders should be experts in the curriculum?
9. Okay when you talk about one-step ahead, in what? Ahead in their knowledge of their subject in their leadership skills?.
10. What are some of the roles you engaged in?
11. Do you think you will get support for your idea?
12. When you talk about time, where do you find the time to do all these leadership activities?.
13. What do you think are the main barriers teacher leaders experience?
14. So if you had to take on a teacher leadership activity, but it had to be done in school. How would you go about doing it?
15. I also saw that you did group work to help the second language learners, why did you do this?
16. Do you think it would be easy for you to have teacher leadership roles delegated to you, or would you want to initiate it yourself?

APPENDIX 9

**6 Corner Barn
Durban Street
Greytown
3250**

DATE.....

The Principal

.....
.....
.....
.....

Dear Sir

I am currently a first year **Masters in Education (ELM)** student at the University of KwaZulu-Natal, Pietermaritzburg. I am presently engaged in a group research study on teacher’s perceptions and experiences regarding teacher leadership. Teacher leadership is an emerging field of research in South Africa and it needs to be built upon. In this regard I have chosen your school because I believe that your teachers have the potential and can provide valuable insight in extending the boundaries of our knowledge on this concept.

Please note that this is not an evaluation of performance or competence of your teachers and by no means is it a commission of inquiry. The identities of all who participate in this study will be protected in accordance with the code of ethics as stipulated by the **University of KwaZulu-Natal**.

I undertake to uphold the autonomy of all participants. They will be free to withdraw from the research at any time without negative or undesirable consequences to themselves. However, participants will be asked to complete a consent form. In the interest of the participants, feedback will be given to them during and at the end of the study.

My supervisor is Ms. C. Grant who can be contacted on 033-2606185 at the Faculty of Education, Room 42A, Pietermaritzburg Campus (School of Education and Development). My contact number is 0824691585. You may contact my supervisor or myself should you have any queries or questions you would like answered.

Yours faithfully

Mrs P. Moonsamy

.....DETACH AND RETURN.....

DECLARATION

I,principal ofhereby confirm that I understand the contents of this document and the nature of this research project and grant Mrs P. Moonsamy permission to conduct research at the school.

PRINCIPAL

DATE

APPENDIX 10

**6 Corner Barn
Durban Street
Greytown
3250**

DATE.....

Dear

LETTER OF INVITATION

I am currently a first year Masters in Education student at the University of KwaZulu-Natal, Pietermaritzburg. I am presently engaged in a group research study on teachers’ perception and experiences regarding teacher leadership. Teacher leadership is an emerging field of research in South Africa and it needs to be built upon. In this regard, I have chosen you as a suitable candidate as I believe that you have the potential and can provide valuable insight in extending the boundaries of our knowledge on this concept.

Please note that this is not an evaluation of your performance or competence and by no means is it a commission of inquiry! Your identity in this study will be protected in accordance with the code of ethics as stipulated by the University of KwaZulu-Natal.

I acknowledge your autonomy as an educator. You will be free to withdraw from the research at any time without negative or undesirable consequences to yourself. However, you will be asked to complete a consent form. In your interest, feedback will be given to you during and at the end of the study.

My supervisor is Ms C. Grant who can be contacted on 033-2606185 at the Faculty of Education, Room 42A, Pietermaritzburg Campus (School of Education and Development). My contact number is 033-4132452.

You may contact my supervisor or me should you have any queries or questions.

Yours sincerely

Mrs P.Moonsamy

.....DETACH AND RETURN.....

DECLARATION

I (full names of participant) hereby confirm that I understand the contents of this document and the nature of this research project. I am willing to participate in this research project.

I understand that I reserve the right to withdraw from this project at any time.

Signature of participant

Date

.....

.....

APPENDIX 11

6 Corner Barn
Durban Street
Greytown
3250

Dear

I am sending this invitation to you as a teacher who might be interested in participating in a research project about teacher leadership in schools. My name is Mrs. P. Moonsamy and I am currently a first year Masters in Education student at the University of KwaZulu-Natal, Pietermaritzburg. I am presently engaged in a research study which aims to explore teacher leaders in action in schools. Teacher leadership is an emerging field of research in South Africa and I believe that teacher leadership has a powerful role to play in improving the teaching and learning in our schools. In this regard I have identified your school as a successful school which exhibits strong leadership at various levels within the institution. I would very much like to conduct research into teacher leadership in your school, and work closely with you, particularly, to extend the boundaries of our knowledge on this concept.

The research project is framed by the following broad research questions:

1. How is teacher leadership enacted in schools?
2. What factors enhance or hinder this 'enactment'?

I am seeking three teachers from your school who:

- Are interested in making a contribution to this research.
- See themselves as teacher leaders.
- Are interested in developing teacher leadership opportunities in schools.

Please note that this is not an evaluation of performance or competence of you as a teacher. Your identity will be protected in accordance with the code of ethics as stipulated by the University of KwaZulu-Natal. I undertake to uphold your autonomy and you will be free to withdraw from the research at any time without negative or undesirable consequences to themselves. In this regard, you will be asked to complete a consent form. Furthermore, feedback will be given to you during and at the end of the project.

My supervisor is Ms .C .Grant who can be contacted on 033-2606185 at the Faculty of Education, Room 42A, Pietermaritzburg Campus (School of Education and Development). My contact number is 0334132452. Please feel free to contact me at any time should you have any queries or questions you would like answered.

Yours sincerely

Ms .P.Moonsamy

-----DECLARATION-----

I (full names of participant) hereby confirm that understand the contents of this document and the nature of this research project. I am willing to participate in this research project. I understand that I reserve the right to withdraw from this project at any time.

Signature of Teacher Leader

Date

.....

.....

APPENDIX 12



RESEARCH OFFICE (GOVAN MBEKI CENTRE)
WESTVILLE CAMPUS
TELEPHONE NO.: 031 – 2603587
EMAIL : ximbap@ukzn.ac.za

28 NOVEMBER 2008

MS. C GRANT (24502)
EDUCATION & DEVELOPMENT

Dear Ms. Grant

ETHICAL CLEARANCE APPROVAL NUMBER: HSS/0755/08

I wish to confirm that ethical clearance has been approved for the following project:

"Teacher leadership in action: Collective case studies"

PLEASE NOTE: Research data should be securely stored in the school/department for a period of 5 years

Yours faithfully


.....
MS. PHUMELELE XIMBA