

Leadership and
Professionalism: A
case study of five
teacher leaders in an
urban primary school
in Pietermaritzburg

Pietermaritzburg, KwaZulu-Natal, South Africa

by

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This dissertation is submitted in partial fulfilment of the
academic requirements for the Degree of Master of
Education.

University of KwaZulu-Natal, Pietermaritzburg.

2012

Acknowledgements

- First and Foremost I would like to thank God for giving me this opportunity of studying my Masters; as well as the knowledge, wisdom and understanding to deal with it effectively.
- To the group supervisor, Dr. Callie Grant, and to my supervisor, Dr. Irene Muzvidziwa, all your hours spent, sacrifices made and effort you put in to helping and guiding me through this process is greatly appreciated.
- To my personal study group, Basil and Mark, a huge thanks you for all your hard work and motivation through this period.
- My fellow seven group members: Basil, Mark, Khule, Lindi, Annie, Chamaine and Kalay it has been a great journey and experience studying with each of you.
- To my supportive family, Abrahams' and Alexander's, your love and support means the world to me.
- My loving and supportive husband, Louwen, your belief and trust in me has kept me focused and motivated.
- To my precious girls; Aaron and Isabella, your love and sincerity have guided me through.
- Finally to my five teacher leaders (Liberator, Motivator, Mediator, Persevere and Innovator) and the staff of my case study school, I am blessed with such a dynamic and creative group of people.

Abstract

The main aim of educational institutions is to ensure that effective teaching and learning is achieved. My personal ontological disposition is that in order to reach this ideal, teacher leadership and professionalism needs to be a reality in all schools. It is for this reason that I embarked on this study to gain a meaningful understanding of how teachers felt they could lead schools better to ensure that they are professional places of teaching and learning. In developing this study I focused on two key areas, which were to examine teachers understanding of professionalism and I attempted to identify what factors enhanced or inhibited teacher leadership and professionalism in schools.

The research methodology that I employed was a case study which was conducted in a secondary school. I employed five data collection tools to obtain the information I required. The first was a survey which was conducted among the entire staff of the school. The second tool was individual interviews that focused on five teacher leaders of the school who were the unit of analysis. The next data collection method involved all five teacher leaders in a focus group interview. The fourth tool was observations that were carried out throughout the research process. The final data collection tool was document analysis, which included a range of documents varying from staff meeting minutes to department policies. In addition, I kept a reflexive field note journal as a tool to enhance the validity of my study.

This study revealed several key findings which I feel are vital for educational success to become a reality. At first this study revealed that teacher leadership was a reality in the case study school and was occurring in four zones: in the classroom, collaboration, whole school and with surrounding schools. Next this study revealed that teaching is a profession that is underpinned by key characteristics, namely: you have to study, uplift the name of the profession and behave and dress in a professional manner. Furthermore, this study revealed that there were several factors that promoted teacher leadership and professionalism, like incentives, school culture and relationships. Finally, this study revealed that there were various barriers to teacher leadership and professionalism, like, unions, formal leadership and teachers' dispositions.

DECLARATION

I, BRONWYN KIM ALEXANDER, declare that the work presented in this document is my own. References to work by other people have been duly acknowledged.

Signed: _____
Student

I declare that this information has been submitted with/without my approval.

Signed: _____
Supervisor

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CHAPTER ONE: INTRODUCTION AND ORIENTATION TO THE STUDY

1.1. Introduction to the chapter

Education was deeply impacted by apartheid and its effects are still being seen in our current context. According to Christie (2008) the legacy of apartheid is still prevalent in schools because it not only affected the inequalities between the different race groups, but it also left “...inequalities between urban and rural schools, between rich and poor, and between girls and boys...” (p. 3). It is evident that the history of a country plays a pivotal role in its current reality and in its future ambitions. South Africa has a distinct history and prior to 1994 it was characterised by the apartheid regime. The country was divided along racial lines in all spheres of society, where the white minority were afforded the best resources and opportunities and the black majority were disadvantaged. It was therefore the task of the new democratic government to eradicate the inequalities faced in education and to achieve quality learning experiences for all learners. My key reason for engaging in my research is that I want all learners to receive quality and worthwhile instruction regardless of their background, race or gender.

1.2. Background to the study

Elmore and City (2009) describe the process of change as being a difficult and challenging task that takes a period of time to become a reality. Extending this idea, Christie (2008) who argues that the new democratic government in South Africa needed to implement drastic changes but at the same time attempt to run the existing systems. It had to “...dismantle the nineteen separate apartheid departments of education, and to restructure them into nine provincially-based departments and a national department...” (2008, p. 129). This has been and still is an extremely difficult task which is compounded by the fact that, according to Griffin (1995), teachers are feeling overwhelmed by all this new information. It is therefore evident that because of the constant changes that are occurring in education and the low morale of the teaching profession that a distinct way forward is needed. It is my view taking into account the context of this study that teacher leadership and teacher professionalism is an area of research that is to be promoted if we wish to achieve effective teaching and learning.

Therefore, I align myself with the argument made by Spillane (2004) who claims that the most critical aspect of successful innovation in schools is leadership. Similarly, Wasley (1991) states that a reforms success or failure is determined by the leadership of a school.

Likewise, Greenlee (2002) extends this argument by stating that in order to improve the academic achievements of learners at any institution; educators must take on the leadership roles and assume more responsibility and accountability for the changes that are occurring at schools. Furthermore, Troen and Boles (1994) claim that the key to successful reform is to create a new profession where educators embrace their roles as change agents.

In line with this thinking; Broadfoot, Osborn, Gilly and Paillet (1988) suggest that any attempt to bring about successful change will fail if the element of teachers' professional motivation and practice is not taken into consideration. Collay (2006) further reiterates this point by stating that teachers are still viewed as 'semi-professionals' because they do not take on the role of formulating policies, instead they are merely the implementers of it. In light of this argument Macmillan (1993) states that teachers need to be developed professionally to enhance the skills needed to effectively implement decisions needed for effective education. The following section will explore my rationale for my study.

1.3. Purpose of the research

Being a post level one educator at my school and teaching for only six years made me aware of those learners were exiting schools not equipped with the knowledge and skills they needed to cope effectively with the outside world. I exited university having the notion that I could single-handedly change my learners' lives for the better. However, once faced with the reality of my profession I began to notice that a staff needs to work together to make any significant differences in learners educational opportunities. Furthermore, I noticed that if educators did not behave in a professional manner then their learners did not receive quality instruction. This meant that if teachers were constantly late for class or not putting in an effort into their work then their students would suffer.

Therefore, I attempted to find solutions to achieve my goal of quality education for all. This is when I began my research into teacher leadership and professionalism, which, although it has been studied in detail over a period of time internationally, is an area of researches that it extremely current in South Africa. I began aligning myself with researchers such as Christie (2008) who states that "...effective schools need strong leadership with curriculum focus, an emphasis on quality teaching and learning and a supportive school environment..." (p. 181). I also began identifying with the argument made by Blegen and Kennedy (2000) who state that it is now time for teachers to become empowered where they are involved in decision

making and key leadership roles as this will stimulate their learners' performances and help them to develop professionally.

Furthermore, I believe that this research will greatly enhance the teaching profession which will in turn promote effective teaching and learning because this research aims to explore how teachers can lead schools better to ensure that they are professional places of teaching and learning. This research is coming at a time where according to Sachs (1999) teachers are feeling overwhelmed by the constant changes and demands placed on them. If all teachers assume their roles as professional leaders in their school community, schools will begin to change into learning communities and as Christie (2008) puts it 'opening the doors of learning' for all.

Against this backdrop, the purpose of this dissertation is to examine how teachers can lead schools better to ensure that they are professional places of teaching and learning. This chapter provides an executive summary of the dissertation and offers the purpose, background and rationale for the case study that was conducted in an urban secondary school in Pietermaritzburg. It also introduces the reader to the research questions, research design and methodology, as well as the theoretical framework underpinning this study.

1.3. Research questions

Core question:

How can teachers lead schools better to ensure that they are professional places of teaching and learning?

Subsidiary questions:

1. How is professionalism understood by teachers?
2. What are the factors which enhance or inhibit teacher leadership and professionalism in schools?

1.4. Research design and methodology

Cohen, Manion and Morrison (2007) argue that there is no single or perfect plan for designing research. These researchers extend this argument by stating that "...research design is governed by the notion of 'fitness for purpose' and the purposes of the research determine the methodology and design of the research..." (2007, p. 78). My research design is qualitative because I sought an in-depth view of teachers' perceptions pertaining to teacher leadership, teacher professionalism and whole school development. According to Babbie and Mouton (2003) the main goal for implementing qualitative methods is to gain an understanding and description, not to look for explanations or to predict human behaviour.

The paradigm that I worked in was the interpretivist paradigm because the major aim for conducting my research was to gain a deeper understanding of how teachers can lead schools better to ensure that they are professional places of teaching and learning. My research was a case study that took place in a secondary urban school in Pietermaritzburg.

There were five data collection methods that I implemented in my study. The first data collection tool was a survey, which included the entire staff responding to a semi-structured questionnaire. I included this method to gain an overall sense from the entire staff how they viewed the ideal of teacher leadership and professionalism. The second data collection method was individual interviews which were conducted with my five teacher leaders who were my unit of analysis. My key reason for implementing interviews was to gain rich and descriptive information on how professionalism is understood by teachers and to discover what factors either promote or hinder teacher leadership and teacher professionalism.

The third data collection tool was a focus group interview which included all five of my teacher leaders. I chose this method to extend on the responses and insights made by the participants in their individual interviews. The fourth method was structured observations that took place throughout the research process in different settings. The final method was document analysis which included basic documents such as staff meeting minutes as well as formal educational and union policies. In addition, I kept a reflexive field note journal throughout the research process to enhance the validity and reliability of my work.

There were various limitations that I anticipated during my research process. For instance, when conducting the questionnaire in schools, it was possible that some educators responded

to the questions in the manner that they thought the researcher wanted instead of a truthful response. However, the content of the questions were formulated in varying degree but held similar themes in order to cross check the teachers' responses.

1.5. Theoretical framework

The theoretical framework that was used in this study is distributed leadership theory. This theory was developed by a range of researchers of which I found four pertinent to my study. At first, Gronn (2000) states that distributed leadership is a transformation in leadership because leadership will be experienced by the majority of educators within an institution not only the minority that was previously the case. Then, Spillane (2004) adds a further dimension by stating that distributed leadership is experienced within the situation of leadership and that it emerges because of the interaction of people and their surrounding environment. This researcher further explains that distributed leadership is framed around four key ideas, which are "...leadership tasks and functions, task enactment, social distribution of task enactment and situational distribution of task enactment..." (2004, p. 5). Spillane (2004) also points out that distributed leadership consists of three elements, which are leaders, followers and the situation.

This theory of distributed leadership is extended by Gunter (2005) who states that distributed leadership can take on three forms; these are authorised, dispersed and democratic. Authorised distributed leadership is where the principal or head teacher distributes leadership tasks. Dispersed distributed leadership is where leadership tasks are not formally allocated but are available for all teachers to take on. Democratic distributed leadership "...opens up possibilities for teachers because it widens their gaze from school as an organisation to the wider role of the school as a public institution within a democracy..." (2005, p. 57).

Grant (2006 and 2008) further extends this theory of distributed leadership by designing a model of teacher leadership, made up of four levels and six zones. Grant (2006) states that educators first level must be taking up leadership positions within their classrooms. The second level is teachers need to develop meaningful relationships with their peers and lead beyond their classroom. The third level is educators must become involved in the whole school development. The final level is educators need to extend themselves into the community and neighbouring schools. Grant (2008) adds on further to these levels and states that there are six roles of teacher leadership that operate within these levels, they are

improvement of teaching practice, developing curriculum knowledge, leading in-service education, evaluating peers, organizing and leading peer reviews and participating in school level decision making.

1.6. Layout of dissertation

The intention of this chapter has been to introduce the reader to my research and explain my purpose for this research as well as provide my rationale for selecting my topic. In addition the reader was exposed to the background of my research which provides an overall context of where this research was situated. I also include my research questions and an overview of the research design and methodology.

In the ensuing chapter, Chapter Two, the reader is offered a wide range of international and national literature focusing on my specific topic of teacher leadership and professionalism. I highlight the major themes and trends as well as identify the gaps that exist in current literature. This chapter focuses on gaining an overview of the key terms such as leadership, distributed leadership, teacher leadership and professionalism. It also examines what factors promote or inhibit teacher leadership and professionalism.

Chapter Three which deals with my research design methodology. It deals with my methodology, the context of my study, methods of collecting my data, the analysis process, ethical issues, as well as the limitations to this study. This chapter also focuses on the participants in the case study research.

Chapter Four follows on and this chapter deals specifically with the presentation and discussion of the findings of my research. This chapter describes the themes that emerged during the process of data analysis and is divided into four sections: teacher leadership, teacher professionalism, factors promoting teacher leadership and professionalism and factors inhibiting teacher leadership and professionalism.

The final chapter in this dissertation is the conclusion where I include several recommendations for future research. This chapter also includes my reflections on my research process as well as some major findings from my study.

The ensuing chapter deals with the review of the literature pertaining to my study.

CHAPTER TWO: AN OVERVIEW OF THE LITERATURE

2.1. Introduction to the chapter

The aim of any educational institution is to ensure that effective teaching and learning is a reality (Harris and Lambert, 2003; Harris, 2004, Grant, 2008). However, educational organisations internationally, nationally and locally have all been exposed to the drastic changes that are occurring in all spheres of society. Hart (1995) argues that because of these changes that are occurring, schools are being placed under tremendous pressure to deal with these changes. To compound matters the professionalism of teachers has also been questioned. South Africa has been no exception to this reality, and as a result it has been exposed to demanding reforms at all levels of educational facilities. It therefore became evident while reading literature that I identified several gaps which inspired my interest in examining how teachers can lead schools better to ensure that they are professional places of teaching and learning.

Furthermore, the public focus has now shifted its attention to the teaching profession and the role that it plays in promoting effective educational success. Wasley (1991), from a US context, argues that the current state of the teaching profession is in a terrible condition and is producing learners that are not confident or competent. This is a reality globally and locally, where learners are exiting schools without the capacity to deal with the realities of life after school. Reflecting on the South African context, Christie (2008) states that even the schools in South Africa that produced outstanding results, were only ranked average compared to their international counterparts. In addition, in light of the strike action that occurred in our country in 2010, the teaching profession is once again in dispute. Teachers (which include all members of a teaching staff) in South Africa, are being viewed as selfish individuals who are only concerned with the improvement of themselves and not with the learners under their care. Teachers are meant to be behaving in a professional manner, where they are punctual, dress and act appropriately, educate learners under their care effectively and never bring their profession into disrepute.

In light of this perception, Muijs and Harris (2003) state that the only way to improve conditions in schools is to implement transformational leaders. Likewise, Grant (2006) citing Beare *et.al* (1989) states that “...outstanding leadership is a key characteristic of outstanding

schools and the development of potential leaders must be given high priority...” (p. 512). It is for these reasons that this chapter focuses on how teachers can lead schools better to ensure that they are professional places of teaching and learning. In developing the argument there will be several areas of focus, in which I explore: the definitions of leadership, teacher leadership, distributed leadership and professionalism to gain a deeper understanding of these terms. These fundamental concepts will also be examined to expose the way in which they are understood and function in teachers’ realities. The chapter will then examine what factors enhance teacher leadership and professionalism in schools. Next, the chapter will focus on what factors hinder or inhibit teacher leadership and professionalism in schools. Finally, the chapter will examine the gaps that exist in the current literature of teacher leadership and professionalism in looking to address these gaps in the research. In the next section I will turn my focus to the definitions of leadership and professionalism, as these terms are the basis for the current research.

2.2. Defining leadership

Before I can define the concept teacher leadership I need to explore the concept of leadership first, as the term leadership informs the ideal of teacher leadership. The term leadership usually refers to a process of social influence in which one person can recruit the support of others in the accomplishment of a common task. However, this view is contested by researchers such as Rogus (1988) who argues that there is not only one view of leadership. On the other hand, I acknowledge the fact that there is a common thread that runs through the views of many researchers on educational leadership who argue that the main person that is viewed as the leader of an organisation is the principal and that the leadership of a school is seen to be in the hands of those in formal positions only. This argument is supported by authors such as Katzenmeyer and Moller (2001) and Spillane (2004) who state that the literature produced on leadership tends to focus on those teachers who operate in formal leadership positions and tends to ignore the people who are in informal positions.

Similarly, Muijs and Harris (2007) argue that leadership is often viewed as being the sole responsibility of the head teacher of a learning organisation. Likewise, Grant (2006), in the South African context, argues that the term leadership is usually understood as headship, which is the responsibility of one person, the principal. Gunter (2005) reiterates this argument by stating that leadership is “...power to and power over relationships...” (p.42). In line with this thinking, Crowther, Kaagen, Ferguson and Hann (2002) state that very often when

educational leadership is being examined, there are always strong elements of authority over individuals that emerge. They further argue that “...traditionally, school based leadership has centred on the role of the principal...” (2002, p. 49). Furthermore, Rogus (1988) argues that a key finding when examining educational leadership research patterns reflects the principal being the key to that educational institutions success.

2.2.1. The impact of leadership

The effect of leadership on any educational organisation is significant. Harris (2004) makes a strong point when she claims in her research that leadership at a school needs to be effective because it greatly impacts on the effectiveness of that institution and also on the achievements of the learners. Similarly, Hartley (2007) states that it is leadership that makes a difference in a school. Furthermore, Muijs and Harris reflect in their research that “...the quality of leadership matters in determining the motivation of teachers and the quality of teaching in the classroom...” (2007, p. 112). Also, Day and Harris (2002) argue that it is the role of the principals to transform schools into organisations where successful teaching and learning is a reality. The most central component in dealing with effective teaching and learning according to Gunter (2005) is leadership. In line with this thinking it is evident that effective leadership is required to improve the conditions in schools. Furthermore, there is a strong argument made that it is now time for all teachers to take on leadership roles to ensure that effective change is a reality at all educational organisations. It is to this teacher leadership argument that I now turn.

I align myself with the argument made by Spillane (2004) that the most critical aspect of successful innovation in schools is leadership. Similarly, Wasley (1991) states that a reforms success or failure is determined by the leadership of a school. In line with this thinking Broadfoot *et.al* (1988) suggests that “...any attempts at change which fail to take into account the real influences on teachers’ professional motivation and practice will be unsuccessful...” (p.286). Also; Crowther *et.al* (2002) citing Fullan (1993) claim that every single educator has the potential to be a change agent. Next, Heller and Firestone (1995) argue that all the literature published on successful change, has stated that strong leadership is the reason for its success. Furthermore, these researchers state that “...successful change results not from the work of a key leader but from the effective performance of a series of change leadership functions...” (1995, p. 67). Therefore, if leadership becomes the responsibility of all teachers this goal is likely to become a reality.

It is therefore my view that in order for whole school improvement to become a reality at all educational organisations, a more inclusive and flexible idea of leadership needs to be introduced. Here, I align myself with the argument made by Day and Harris (2002), Gronn (2000) and Muijs and Harris (2007) who all share the same sentiments when they argue that leadership must never be viewed as something that is fixed but it must be viewed as being fluid and emergent. Timperley (2005) argues that we need to find alternative ways of viewing leadership in terms of “...activities and interactions that are distributed across multiple people and situations and involve role complementary and network patterns of control...” (p. 395). This new idea of leadership as teachers being leaders and the principal or head teacher being the leader of leaders is shared by Ash and Persall (2000). Muijs and Harris (2007) argue along similar lines when they state that all educators have the potential to lead and that all schools offer possibilities or opportunities for teachers to take on these roles at different times. This form of leadership, according to Spillane (2004), focuses on interactions and activities in specific contexts. Furthermore, Barth (1988) makes a powerful argument when he states that leadership is meant to be making what you believe into a reality. He further argues that “...everyone deserves the opportunity for leadership...” (1988, p. 40). Similarly, Hess (1998) states in her research that in order for schools to effectively change and improve, leadership needs to move away from being an individual task and become a collective endeavour. Furthermore, Harris and Lambert state that “...leadership is about learning together and constructing meaning and knowledge collectively and collaboratively...” (2003, p. 16). Therefore, the restricted view of leadership being the responsibility of one person in a formal role will not eradicate the problems faced in education currently. It is therefore evident that the leadership of an organisation is a vital part in its functioning and success.

I now attempt to consolidate how the trend has led to clearer definitions of teacher leadership.

2.2.2. Defining teacher leadership

In order to solve the problems and constant changes faced in education the theory and practice of teacher leadership needs to be implemented in all schools. The term teacher leadership refers “...to teachers taking up informal and formal leader roles in the classroom and beyond into areas of whole school development and community involvement...” (Grant, 2005, p. 44). Harris (2004) describes it as being a form of leadership which develop teachers’ expertise by them working together. In addition, Troen and Boles (1994) state in their research that educators need to extend themselves from being leaders in their classrooms by

moving into leadership roles within schools and into their communities as a whole. Furthermore, Barth (1988) argues that all educators have the potential to lead and this leadership will improve the school as a whole. He further argues that “...every teacher is good at, or wants to and can become good at, some important part of life and work of a school...” (1988, p. 40). Also, Grant (2006) states in her research that South Africa needs to move away from hierarchically structured leadership to a more democratically structured format that will include all educators. Similarly, Muijs and Harris (2007) state that teacher leadership is viewed as a set of practices and behaviours that is done by a staff collectively. Furthermore, in reading the various literatures on teacher leadership, a range of distinct characteristics came to the fore. I have chosen, for the purpose of my study to focus on several distinct characteristics of teacher leadership that speak to the central idea of how teachers can lead schools better to ensure that they are professional places of teaching and learning.

2.2.2.1. Characteristics of teacher leadership

There are several characteristics that underpin teacher leadership. Firstly, according to Howey (1988), teacher leaders are educators who influence other educators to act where they normally would not have. Secondly, Gehrke (1988) states that teacher leaders need to possess mentoring qualities to help teachers that are just starting off in the profession. Thirdly, according to Rogus (1988), teacher leaders are individuals who are able to work collectively with others towards the same goal. Furthermore, Ash and Persall (2000) state that all educators must be viewed as leaders and the principal is the leader of the leaders. Greenlee (2002) extends this idea by stating that “...teacher leadership is a collaborative effort in which teachers develop expertise and promote professional development to improve instruction to all students...” (2002, p. 45). In addition, the literature suggests that there are various roles that teacher leaders need to engage in to ensure that they are reaching their full potential, which in turn will improve the current conditions and professional practices faced in schools.

2.2.2.2. Teacher leadership roles

There are various roles that a teacher leader is expected to fulfil. At first, according to Howey (1988), teacher leaders need to take on four distinct roles if they wish to reach the ideal of effective teaching and learning at their educational institutions. These roles are, to begin with, teacher leaders must be effective within the classroom. Next, they have to serve as mentors to beginning teachers, where they will advise and support them. Thirdly, teacher leaders will work collectively with others to identify problems and find solutions within their schools.

Fourthly, teacher leaders are expected to create instructional material for their subject specializations. Similarly, Rogus (1988) argues that teacher leaders know their capabilities and view themselves positively. Also, they work collectively with others towards a common goal. According to Darling-Hammond *et.al* (1995), teachers need to take on roles of producers, shapers and users of knowledge. Furthermore, Gunter claims that by “...working together over time means that people get to know, rely on and trust each other...” (2005, p. 54). Muijs and Harris (2003) further reiterate the varied roles of teacher leadership when they discuss the four dimensions of teacher leadership. The first dimension they discuss is that teacher leaders must implement the principles of school improvement into their individual classrooms. The second dimension is to be inclusive of all members of staff in decision making. The third dimension is that teacher leaders must be mediators. The final dimension is that teacher leaders must form meaningful relationships with their peers, members of other schools and the community as a whole. These four dimensions and the various roles are of a vital importance as they will impact on all teachers’ leadership capacities in a positive manner, which will in turn improve on the educational achievements in schools.

Furthermore, the roles of teacher leadership are extended by Grant (2006) in a South African context. She discusses the four levels that teacher leadership is meant to be operating in, so as to ensure that teachers and schools are constantly improving. The first level is that educators must be leaders within their classrooms. The second level is teachers must develop meaningful relationships with their peers and lead beyond their classroom. The third level is educators must become involved in the whole school development. The final level is educators need to extend themselves into the community and neighbouring schools. In addition, Grant (2008) expands these levels by discussing the six roles of teacher leadership that operate within these levels, they are improvement of teaching practice, developing curriculum knowledge, leading in-service education, evaluating peers, organizing and leading peer reviews and participating in school level decision making. Furthermore, teacher leadership can take on a formal or informal role. In the next section I attempt to unpack the differences between formal and informal roles.

2.2.2.3. Formal and informal teacher leadership

There are two types of teacher leadership that exist in education. Firstly, formal leadership is where educators are formally placed into positions of leadership, like a subject co-ordinator. Secondly, informal leadership is where educators take control over activities such as athletics

or discipline committees without being formally placed there. Similarly, Harris (2004) and Spillane (2004) both argue that teachers can take on leadership roles both formally and informally. Also, Spillane argues that “...our distributed perspective focuses on how leadership practice is distributed among positional and informal leaders as well as their followers...” (2004, p. 16). In addition, Muijs and Harris (2003) further distinguish between formal and informal leadership roles, by stating that informal leadership roles will be tasks that are mainly classroom related such as planning and supervising. On the other hand, formal leadership roles usually involve tasks outside the classroom and it could involve tasks such as subject co-ordinator, a head of department or a deputy principal. Furthermore, Greenlee (2002) claims that teacher leadership is about much more than merely empowering educators to make decisions. This researcher further claims that teacher leadership “...concentrates on engaging expertise wherever it exists within an organisation rather than seeking this only through formal positions or roles...” (2002, p. 13). Gunter (2005) also states that all educators will become empowered because tasks are delegated and shared. Regardless of teachers being formally or informally involved in teacher leadership, the main aim is that all educators are involved in some element of it to ensure that effective education is a reality for the majority of learners. Furthermore, Harris and Spillane (2008) argue that in order to gain a deeper understanding of teachers’ roles, both formally and informally, a distributed model of leadership needs to be introduced.

2.2.3. Defining distributed leadership

In defining distributed leadership, Spillane (2004) argues that distributed leadership centres around four key ideas. These ideas are “...leadership tasks and functions, task enactment, social distribution of task enactment situational distribution of task enactment...” (2004, p. 5). Spillane (2004) further explains that distributed leadership is experienced across the situation of leadership and that it emerges because of the interaction of people and their surrounding environment. He also points out that distributed leadership consists of three elements which are leaders, followers and the situation. Taking the idea of distributed leadership further, Gunter (2005) states that distributed leadership can take on three forms; these are authorised, dispersed and democratic. Authorised distributed leadership is where the principal or the head teacher distributes leadership tasks. Dispersed distributed leadership is where leadership tasks are not formally allocated and they are initiated by many teachers in an organisation. Democratic distributed leadership “...opens up possibilities for teachers because it widens their gaze from the school as an organisation to the wider role of the school as a public

institution within a democracy...” (2005, p. 57). This form of distributed leadership is excellent because it moves away from the teachers’ sole responsibility within the classroom but extends teachers’ capacity beyond the classroom confinements, it is about challenging the status quo on the quest for social justice and inclusion. Furthermore, Grant (2008) extends the definition of distributed leadership in a South African context, by arguing that there are leadership opportunities for all teachers available at different levels of educational institutions. She further promotes this ideal because distributed leadership links leadership to teaching and learning, which is the primary goal of any school. In addition, Grant (2008) states that distributed leadership “...opens up opportunities for teachers to lead in different areas at different times with different purposes in their professional lives...” (p. 85).

2.2.3.1. Why distributed leadership?

Distributed leadership is a vital component of this study because according to Harris and Spillane “...it is primarily concerned with leadership practice and how leadership influences organisational and instructional improvement...” (2008, p. 31). It is therefore evident that this concept is a critical element in this research because the main focus of the study is to identify how teachers can lead schools better to ensure that they are professional places of teaching and learning. In addition, Woods (2004) argues that the hierarchical organisations in education are far too rigid and inflexible. He further states that in order to improve the conditions in schools these organisations, “...need to be replaced by lateral forms of organisation that rely heavily on teams, networks and shared leadership...” (2004, p. 4). Similarly, Day and Harris (2002) argue that schools need to develop into learning organisations and the only way to achieve this goal is to adopt a distributed leadership perspective. They argue that improvement in schools will automatically be achieved because teachers will be searching internally for meaning, relevance and connection. Furthermore, I share the sentiments expressed in the argument made by Muijs and Harris when they state that “...distributed forms of leadership can be developed and enhanced to contribute to school development and improvement...” (2003, p. 57). Hart (1995) and Harris and Spillane (2008) all agree that this period of distributed leadership is a period of post-heroic or even post-charismatic leadership because it does not focus on one person in a leadership position instead it serves as an analytical framework to examine leadership practice within a school. In addition, Harris (2004) argues that when distributed leadership is practiced correctly it empowers others to lead and make a difference. Furthermore, Timperley (2005) claims that distributed leadership build the capacity of a school because it develops educators’

professional and intellectual capacity. This researcher further reiterates her claim by stating that effective school reform can only be achieved through greater distribution.

Furthermore, Woods (2004) argues that distributed leadership is an excellent framework to adopt because of its empowering element to the majority of staff. He further reiterates his argument by stating that distributed leadership “...encompasses discussion, debate and sharing of ideas and encouragement of people to feel good about their involvement...” (2004, p. 13). Likewise, Muijs and Harris (2003) state in their work that distributed leadership encourages a staff to work collectively and collaboratively and they become interdependent. In addition, Grant (2008) argues that distributed leadership builds the capacity of all teachers to lead, which in turn improves the quality of teaching and learning. To further explain, Harris and Spillane (2008) state three key reasons for the promotion of distributed leadership. These are, at first that distributed leadership is a vital component to introduce in schools because of the radical changes that are occurring in the leadership practices in schools. Secondly, because of the increased external pressures and the demands placed on schools, distributed leadership deals effectively with this problem. Thirdly, Harris and Spillane argue that “...the old systems do not fit the requirements of learning in the twenty-first century...” (2008, p. 31). In addition, there is a strong link between leadership and professionalism because a teacher needs both these ideals in order to effectively deal with the overwhelming task of improving conditions in schools.

2.3. Defining professionalism

Professionalism is a vital component of this study as one of the key areas for undertaking this research is to discover how professionalism is understood by teachers. According to the SACE (2006), which is the South African Council for Educators that aims to enhance the status of the teaching profession and promote the development of teachers and their professional conduct, document published on ‘The state of professionalism in South Africa’, there are four key elements that underpin professionalism. These are autonomy, accountability, ethics and a sound knowledge of the profession. Similarly, Macmillan (1993) writing from a US context, states that autonomy is the most vital component in a profession. I align myself with this argument when he states that professionalism is understood to be “...presumed autonomy of the profession and its members, the freedom to make professional decisions without the interference from non-professional persons or government bodies...” (1993, p. 189). The idea of professionalism is extended by Broadfoot *et.al* (1988) when they

state that teacher professionalism can be found in two forms. The first form is called restricted professionalism which is professionalism found within the classroom. The second form is extended professionalism which links professionalism beyond the classroom, in terms of the whole school and the wider social context.

In addition, one of the Australian perspectives on teacher professionalism is introduced by Sachs (1999) when he cites Preston (1996) in the argument that teacher professionalism needs to have a democratic element in terms of "...participation in decision making by students, parents and others and seeks the broader understanding in the community of education and how it operates..." (p. 2). Furthermore, the idea of professionalism is a process, according to Hoyle (1982) which needs to meet the criteria of a particular profession. In the South African context, the SACE (2006) document reflects on the history and the current situation of professionalism. It states that during the era of Apartheid teacher professionalism was under extreme bureaucratic control and racism was enhanced. However, with the implementation of democracy in 1994, teacher professionalism is developing to enhance the skills of teachers to enable them to be equipped with skills such as participation and collaboration, which will improve on the current conditions within the classrooms.

2.3.1. Why professionalism?

Teacher professionalism is a vital tool for teachers to be equipped with as it helps all teachers reach their full potential, which in turn ensures that successful education is a reality. However, Collay (2006) argues that educators are still viewed as 'semi-professionals' because they do not take on the role of formulating policies, instead they are merely the implementers of policy. This argument is extended by SACE (2006) which states that there have been various studies conducted in South Africa and they all show that teachers are not adequately trained to be policy formulators, they are only policy implementers. Furthermore, Macmillan (1993) states that teachers need to develop professionally to develop the skills needed to effectively implement decisions needed for effective education. In light of this argument, I share the sentiments made by Broadfoot *et.al* (1988) when they state that successful change in teaching and learning will not be a reality if teachers' professional identity is not enhanced or developed. Likewise, the argument made by Collay (2006) extends this discussion by stating that "...professional identity is not central to teacher leadership literature, yet it may be a key to successful reform..." (p. 5).

Furthermore, Troen and Boles (2005) argue that there needs to be a drastic change in the current culture that exists in schools today, in order for teachers to become professionals working in a collaborative culture instead of being viewed as ‘assembly-line workers’ working alone. This change needs to become a reality in all schools to ensure that they become institutions where effective teaching and learning is achieved. Also, Heystek (2008) states that teaching is currently viewed as being ‘semi-professional’ however, it is striving to become a true profession so as to ensure that educational success is a reality. Furthermore, the SACE (2006) document states that teachers feel motivated by their professionalism because it empowers them to make important decisions which greatly impact on their learners’ development. In addition, there is a strong argument made by Vongalis-Macrow who states that “...a teacher is represented as a principal figure, entrusted with the moral authority, able to make sense of change, and in doing so, can help students to make sense of change...” (2002, p. 8). Hoyle (1982) extends on the need for professionalism by arguing that by teachers developing professionally, it will therefore develop their skills, which in turn will improve on the academic and holistic success of their students.

2.3.2. The link between professionalism and leadership

There is a strong link between teacher leadership and teacher professionalism, both of these concepts are underpinned by characteristics such as collegiality, autonomy, accountability and transformation. Also, both these terms are vital components needed by teachers to ensure that all teachers possess the skills required to lead schools better to ensure that they are professional places of teaching and learning. Rizvi (2008), in the Pakistan context, argues that it is the responsibility of the principal of an institution to change the leadership styles to be more distributive and collective which in turn will enhance teacher professionalism. Likewise, Troen and Boles make a strong argument when they state that the cultures of schools need to change, so as the occupation of teaching is transformed “...into an open, collaborative culture that fosters excellence and accountability...” the professionalism of teachers is enhanced (p. 52). However, Gunter (2010) and Sachs (1999) both argue that regardless of the advantages of teacher leadership on professionalism, there still remains the power of the government and department in controlling schools in terms of curriculum and learner performances. On the other hand, Broadfoot *et.al* (1988) argues that any attempt to comprehend the motivation driving teachers’ professionalism must focus on the context of the teaching situation itself. Likewise, Macmillan (1993) states that “...professionalization of teachers takes place in the context where the purpose of the discussion is to find ways of

improving schools...” (p. 191). This in turn reflects how important teacher leadership and teacher professionalism are in improving the conditions of teaching and learning. These ideals of teacher leadership and teacher professionalism are crucial in the change process and it is to this discussion that I now turn.

2.4. The role of leadership and professionalism in the change process

Teacher leadership and teacher professionalism create an agency within teachers, which empowers them to bring about successful change within and beyond a learning institution. Greenlee (2002) states that in order to improve on the academic achievements of learners at an institution, educators must take on leadership roles and more responsibility and accountability for changes that are occurring at schools. Also, Gronn (2000) describes the emphasis of distributed leadership being on joint agency. Furthermore, Ash and Persall claim that “...leaders should create a culture that reduces fear of change and implements organisational processes that promote innovative practices...” (2000, p. 2). Muijs and Harris (2002) argue that teacher leadership has been introduced into education because of the tremendous transformational activity that it occurring. Also, Smylie (1995) argues that by changing structures and cultures in a strategic manner teacher leadership becomes a reality in schools. Furthermore, Troen and Boles claim that “...the key to successful reform in schools lies in creating a new profession of well educated teachers prepared to assume new powers and responsibilities to redesign schools for the future...” (1994, p. 40).

In addition, teacher leadership and teacher professionalism builds the capacity within a school to deal effectively with changes because the teachers themselves are empowered change agents. Blegen and Kennedy (2000) claim that because of teacher leadership, schools will have the capacity and skills to adapt to an ever-changing, unpredictable world. Crowther *et.al* (2002) states that the school improvement strategies that are introduced into schools need to be supportive of all individuals, so that teachers feel confident in exerting their agency and making a difference. Likewise, Harris and Lambert (2003) argue that school improvement can only become a reality if schools are willing to change the way things are done. In this regard, they claim that “...school improvement is essentially a process of changing school culture...” (2003, p. 14). Extending this idea, Muijs and Harris (2005) claim that building capacity in school implies a complete change in the organisation of schools. They state that “...by placing teachers at the centre of change and development, there is a greater opportunity for organisational growth...” (2005, p. 30). Furthermore, Grant (2006)

argues that at the heart of educational change in South Africa are distributed leadership and teacher leadership.

2.4.1. Why teacher leadership and professionalism?

Teacher leadership and teacher professionalism greatly enhances teachers' skills to lead schools better to ensure that they are professional places of teaching and learning. Rizvi (2008) argues that in the Pakistan context it is the responsibility of the principal to develop a school into a community where educators view themselves as professionals, working collaboratively to improve the conditions in schools. She develops this argument by stating that principals need to introduce elements of "...appreciation, understanding, support and other factors to positively shape teachers' practices and enhance their professionalism..." (2008, p. 95). Likewise, the idea of extending a teachers' professional capacity is reiterated by Troen and Boles (2005) who argue that educators need to be afforded opportunities to engage in professional activities not only within their classrooms but beyond. Broadfoot *et al.* (1988) state that within their research it is reflected that in the French context professionalism and leadership is felt to be the experiences that are engaged in within a classroom, whereas the English context extends this ideal beyond the classroom into the broader school community. I align myself with Sachs (1999) who argues that by developing and enhancing teachers' professionalism it will impact their lives positively which will in turn change the context and culture of a school into one that will improve the areas of effective teaching and learning.

Furthermore, teacher leadership and teacher professionalism help teachers to develop to their full potential which in turn will improve conditions in schools. Gehrke (1988) and Katzenmeyer and Moller (2001) argue that educators need to be leaders within and beyond their classroom. They continue by claiming that if this becomes a reality, then all schools will automatically improve. Likewise, Harris (2004) states that teacher leaders need to manage both their internal and external environments effectively. Furthermore, Muijs and Harris (2007) claim that by teachers working collaboratively within and beyond their classrooms and even their schools they are enhancing their leadership skills. Barth (1988) offers a suggestion on how to foster teacher leadership by stating that principals or head teachers must provide opportunities for teachers to lead in situations they feel passionate about. Also, Harris and Spillane (2008) argue that distributed leadership is greatly shaped by the context in which it operates. Furthermore, Darling-Hammond, Bullmaster and Cobb (1995) state that "...some

teachers take the initiative to look further, to look for opportunities to make needed changes at the district level and beyond...” (p. 100). In turn the impact of teacher leadership and teacher professionalism is significant because it changes the culture of a school into a more professionally and academically sound place.

To extend this argument, teacher leadership and teacher professionalism help to transform schools into places of effective instruction and holistic development. Muijs and Harris (2003) argue that an organisation will only improve and sustain its improvement if it has the ability to nurture and foster a professional learning community or a community of practice. The claim that teachers can only take on leadership roles effectively if they belong to a professional learning community is shared by Greenlee (2002). Furthermore, Day and Harris (2002), citing Wenger (1988), argues that “...individuals derive their understanding of their work and their identity from the community of practice within which they carry it out...” (p.961) the view that educators never belong to only one community, they are always involved in various communities at the same time is expressed by Day and Harris (2002). Also, Harris and Muijs (2005) claim that there are three components of a community of practice; these are trust, knowledge and leadership capacity. Furthermore, the claim that these learning communities, according to Muijs and Harris (2003), help to improve classroom and school environments and it also greatly impacts on learners’ academic achievements is a strong argument. They reiterate their argument by stating that professional learning communities, “...lead strong and measurable improvements in student learning, create and support sustainable improvement that last over time because they build professional skill capacity to keep the school progressing...” (2003, p. 440). Teacher leadership and professionalism contribute significantly to whole school improvement, and it is to this discussion that I now turn.

2.4.2. Teacher leadership and professionalism as whole school practice

Teacher leadership and professionalism needs to be adopted by all teachers if schools are to become professional places of teaching and learning. Harris (2004) states that there is substantial evidence within the school improvement specialisation that validates the positive effect teacher leadership has on improving conditions in schools. She further claims that there is a clear implication that this form of leadership “...is most likely to contribute to school improvement and to build internal capacity for development ...” (2004, p. 13). The argument made that there is a very close relationship between a learners’ culture and their academic

achievements is expressed by Bourdieu (1986). He argues that all learners possess cultural capital and depending on the social class that you emerge from your cultural capital will be determined. Bourdieu (1986) further argues that children from middle class backgrounds achieve better results than children from lower class backgrounds. In order to eradicate the inequalities of the past Harris (2004) argues that teacher leadership is most likely to improve the outcomes of the learners because the educators are all empowered in the areas or specialisations that appeal to them. Similarly, reflected in their research Muijs and Harris (2007) state that effective leaders improve on the academic achievements of their learners. Furthermore, Blegen and Kennedy (2000) argue that the key reason for leaders being effective is because they are working collectively towards a shared vision.

I share the sentiments of Day and Harris (2002) who argue that in both school effectiveness and school improvement research the key factor that impacts on their success is a distributed form of leadership. Similarly, Crowther *et.al.* (2002) claims that “...teacher leadership is essential to school success based on collective purpose and effort...” (p. 31). These researchers validate their argument by stating that the entire staff’s contribution is more effective than only a limited amount of them. Furthermore, Darling-Hammond *et.al.* (1995) reiterate this argument by stating that the capacity of schools to deal with learners in need improves when teacher leadership is implemented. They further argue that by teachers working together to create new forms of knowledge, skills and values, it improves on the learning culture of an institution, making it more powerful. Likewise, Harris and Spillane state that “...there is increasing research evidence that distributed leadership makes a positive difference to organisational outcomes and student learning...” (2005, p. 32).

In relation to teacher leadership in the classroom, Mertens and Yarger (1988) argue that the reason for classroom instruction improving is because teachers begin feeling empowered and involved. This argument is extended by Rizvi (2008) who states that teachers need to develop professionally in order to feel competent in their roles as change agents. Similarly, Gehrke (1988) claim that, “...when teachers take on leadership roles it positively influences their ability to innovate in the classroom and has a positive effect on student learning outcomes...” (p. 14). Also, the claim that the key focus in any educational institution is to ensure that effective teaching and learning is a reality is expressed by Grant (2008). She claims that teacher leadership can greatly contribute in reaching that goal. Next, Harris and Muijs (2005) declare that leadership plays a powerful role in improving schools and sustaining that

improvement. They further argue that teacher leadership, "...at its most practical provides a way of teachers working together to improve the learning experiences of young people..." (2005, p. 48). However, in order for teacher leadership and professionalism to be enacted, certain conditions are required.

2.5. Factors enhancing teacher leadership and professionalism

There are various factors that contribute to the success of teacher leadership and professionalism. To begin with, Muijs and Harris (2007) offer several factors that enhance or promote teacher leadership. Firstly, they argue that schools that are the most successful display elements of educators working collaboratively. Secondly, these researchers claim that schools need to provide endless and valid opportunities for teachers to take on leadership roles. Thirdly, Muijs and Harris argue that "...as a consequence of shared vision, teacher leadership is being facilitated, supported and enhanced in schools..." (2007, p. 114). Next, these researchers claim that teacher leadership relies heavily on the trust component of an organisation. Finally, Muijs and Harris (2007) state that teachers need to feel tremendous support from the school management team and the principal.

In addition, Barth (1988) also offers a list of various factors that promote teacher leadership. He claims that the key factor is the principal. Barth (1988) argues that the principal needs to share his or her vision with the staff in a clear manner, so that all the teachers understand what they are working towards. He further states that the principal must be willing to relinquish his or her power. In addition, Barth (1988) claims that principals must be also willing to share in the responsibility for failure. On the other hand, principals must acknowledge successes and reflect them upon those teachers that were involved. Also, teacher leadership is enhanced, "...when principals expect teachers to be committed and responsible school leaders, the leadership tendencies are more likely to emerge..." (1988, p.42).

Furthermore, Grant (2008) argues that certain structural and cultural conditions are absolutely necessary to promote teacher leadership. Firstly, Grant (2008) argue that schools need to adopt a culture of distributed leadership, where teachers feel confident and supported. Secondly; teachers need to work together, trust each other and support each other. In addition, Grant (2008) claims that the school management team needs to provide educators with time and resources so that they can develop their leadership capacities.

Likewise, there are various other researchers that have also provided critical factors that promote teacher leadership. Blegen and Kennedy (2000) states that teacher leadership will only flourish in an organisation that has a climate that promotes risk taking. According to Crowther *et. al.* (2002), the development of teacher leadership “...requires public and professional acceptance of the existence of teacher leadership in the profession and in schools...” (p. 33). Also, Gehrke (1988) argues that schools need to empower and encourage educators to become leaders. In addition, Muijs and Harris (2003) state that teacher leadership is greatly influenced by the relationships that exist on a staff.

Incentives, both financial and non-financial, are a vital component in promoting teacher leadership and teacher professionalism. Troen and Boles (2005) argue that the idea of merit pay was an idea that originated in England in 1710. They extend this idea by stating that merit pay still exists in various forms “...including bonuses for student gains, satisfactory evaluations by principals or committees, acquisition of new skills or knowledge, and serving in hard-to-staff schools...” (2005, p. 52). Holland (2005) offers education a way forward by suggesting the implementation of merit pay to motivate teachers to take on leadership roles and to develop professionally. I align myself with the argument put forward by Rizvi (2008) who argues that not only are financial incentives important but also important is emotional upliftment “...which is based on mutual trust, helps employees feel intrinsically rewarded and become emotionally attached to the organisation...” (p. 94).

Finally, unions have a powerful influence on enhancing teacher leadership and professionalism. Vongalis-Macrow (2007) argues that the union plays a vital role in making allowances for its participants to engage in discussions on matters of change and their working conditions. In addition, this researcher extends her argument by stating that unions have become an avenue of “...managing employees when dealing with wages and benefits, policies, training and development, career and promotion...” (2007, p. 5). I align myself with the view expressed by Govender (1998) who argues that if a teacher union is powerful in its capacity it can influence issues of economic and social justice. Within the South African perspective, Heystek (2001) argues that two of the teacher unions, SATU and NAPTOSA, both are involved in developing their teachers holistically in terms of skills, knowledge and professional development.

2.6. Factors that inhibit teacher leadership and professionalism

Literature published on teacher leadership, both national and international, all indicate the benefits of implementing this ideal. However, there are various factors that prevent this ideal from being a reality. Firstly, Troen and Boles (1996) state that teachers are reluctant to view themselves as leaders. Secondly, they argue that educators are only familiar with top-down management style not a democratic one. Thirdly, some teachers will not accept being told what to do by other educators. Next, some principals feel that they will not have control if they surrender their power to educators. Finally, Troen and Boles (1996) argue that the term teacher leadership will remain only a term if there is no creation of new leadership roles in schools.

Muijs and Harris (2003) argue along similar lines when they state that teachers did not feel comfortable taking on leadership roles because they are afraid of being disliked by their peers. They further argue that they feel nervous and uncertain about implementing teacher leadership because they are only familiar with hierarchical structures of management.

Similarly, Grant (2008) argues along similar lines when she focuses on barriers to teacher leadership. She states that the context of a school greatly influences teacher leadership. Her argument states that many educators do not want to accept responsibility and accountability this is why they are resistant to teacher leadership. Grant further points out that "...a lack of teamwork, collaboration and shared vision seemed to be a major cultural barrier to professional development." (Grant, 2008, p.99) Grant (2006) reflects in her research that schools that are controlled by autocratic principals and that are organized in a hierarchical manner will not implement teacher leadership. She also states that some educators feel that only people in formal leadership positions should lead. Furthermore, she argues that there are many educators that are resistant to change.

Finally, unions have a powerful influence on inhibiting teacher leadership and professionalism. Vongalis-Macrow (2007) argue that teachers' unions of the past "...are associated with strikes and actions that blocked reforms..." (p. 5). This is still a reality in the South African context, in light of the strike action that occurred in 2010. Furthermore, Holland (2005) argues from a US perspective that some union leaders do not encourage teacher leadership and professionalism because they feel that if individuals feel empowered

they will not want to work collectively which will therefore weaken the unions' collective power. Finally, Heystek (2001) states that the teacher union, SADTU in South Africa, is not concerned with developing a teacher professionally instead they are concerned with improving the working conditions of their participants.

2.7. Conclusion to the chapter

Teacher leaders are generally accepted as being, "...teachers who are leaders that lead within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others towards improved educational practice..." (Grant 2005, p. 514). This ideal is the most feasible solution to improve conditions in schools. However, there are various gaps that exist in the literature, that require our immediate attention in order to make teacher leadership in schools a reality. At first, Harris (2004) argues that a link is made between school improvement and teacher leadership, but there is limited evidence to support this argument. Also, Spillane, Halverson and Diamond (2004) state that the majority of literature that exists on educational leadership has focused mainly on the principal and has neglected teacher leadership. Furthermore, Timperley (2005) states that, "...empirical work on how leadership is distributed within more or less successful schools is rare..." (p. 412). In addition, Hartley (2007) and Timperley (2005) argue that teacher leadership is a very current concept with very limited emancipatory research. Finally, Collay (2006) argues that teacher leadership literature has not focused on the impact of professionalism even though professionalism could be the key to successful transformation. It is my view that teacher leadership needs to be adopted by all educational institutions as this model is the only way to ensure that education is inclusive of the majority of the major stakeholders.

CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY

3.1. Introduction to the chapter

Educational research is research that is conducted in order to examine the various behavioural patterns in learners, students, educators and other participants in schools and other educational organisations (Jansen, 2007). Bassey (2007) extends this argument by stating that the key reason for embarking on any type of educational research is to help all individuals involved in education make more informed judgements, which would therefore improve on educational success. Furthermore, Cohen, Manion and Morrison (2007) state that there is no single or perfect plan for designing research. These researchers extend this argument by stating that “...research design is governed by the notion of ‘fitness for purpose’ and the purposes of the research determine the methodology and design of the research...” (2007, p. 78). Therefore, this chapter will focus on my research design and methodology to discover how teachers can lead schools better to ensure that they are professional places of teaching and learning. In developing this chapter there will be several areas of focus, namely: the research aim and questions; the research methodology; the context of my study; the methods of data collection; data analysis; ethical issues and the limitations of my study.

In addition, it is important to explain that this chapter makes a clear distinction between the terms method and methodology. At first, the term methodology will be referred to as the manner in which my research is designed and conducted (Rule and John, 2011). In this specific instance, the methodology that I employed was case study research. The term methods are described as the “...range of approaches used in educational research to gather data which are to be used as a basis for inference and interpretation...” (Cohen, *et. al*, 2007, p. 47). The methods that I used in my study were interviews, questionnaires, observations and document analysis.

3.2. Research aim and questions

The aim of any educational institution is to ensure that effective teaching and learning is a reality (Harris and Lambert, 2003; Harris, 2004; Grant, 2008). Therefore, the aim of this research is to find out how teachers create teaching and learning environments that are conducive for their learners. Educational organisations internationally, nationally and locally have all been exposed to the drastic changes that are occurring in all spheres of society. South

Africa has been no exception to these changes and as a result tremendous pressure has been placed on all levels of educational facilities. Furthermore, the public focus has now shifted its attention to the teaching profession and the role that it plays in promoting effective educational success. In addition, in light of the strike action that occurred in our country in 2010, the teaching profession is once again in dispute. Educators', in South Africa, are being viewed as selfish individuals who are only concerned with the improvement of themselves and not with the learners under their care.

Therefore; the current situation that South African education is in and my own ontological disposition that the promotion of teacher leadership and teacher professionalism will ensure that effective teaching and learning is achieved, is the reasons that inspired my research focus. This research focused on how teachers can lead schools better to ensure that they are professional places of teaching and learning. The research was developed around two crucial areas of focus. At first, it aimed at looking at how professionalism was understood by teachers. It then focused on what factors either promote or hinder teacher leadership and professionalism in educational institutions.

3.3. Research design and methodology

3.3.1. Working within the interpretive paradigm

Rule and John (2011) describe a paradigm as being "...a broad orientation to knowledge and reality..." (p. ix). The paradigm that my research fell into is the interpretivist paradigm because the major aim of conducting this research is to gain a deeper understanding of how teachers can lead schools better to ensure that they are professional places of teaching and learning. Therefore, I align myself with researchers such as Cohen, *et. al* (2007) who argue that researchers working within the interpretivist paradigm aim to understand how people make sense of the contexts in which they live and work. These researchers further state that the world is constantly evolving and that it is individuals who define the meaning of a specific situation. Furthermore, Macmillan and Schumacher (2002) take this point further by stating that "...interpretive researchers use systematic procedures but maintain that there are multiple socially constructed realities..." (p. 6). It was therefore evident that this was the most suitable paradigm for my research as I focused on specific teachers' perceptions on their own socially constructed realities.

3.3.2. Locating the research as a qualitative study

Qualitative methods were the approach that I adopted in my research design because I sought an in-depth view of teachers' perceptions pertaining to teacher leadership, teacher professionalism and whole school development. I therefore align myself to Babbie and Mouton (2003) who state that the main goal for implementing qualitative methods is to gain an understanding and description, not to look for explanations or to predict human behaviour. They develop their argument by stating that "...the primary aim is in-depth 'thick' descriptions and understanding of actions and events..." (2003, p. 270). In addition, qualitative research is viewed as research that is undertaken to gain an understanding of the participants' realities, which Babbie and Mouton (2003) refer to as the 'emic' perspective and Briggs and Coleman (2007) suggest that this is a 'verstehen' understanding.

Furthermore, one of the key elements that underpin qualitative research is the context in which the research is conducted. According to Scholz and Tietje (2002) who cite Stake (1995) state when working with qualitative methods you need to "...treat the uniqueness of individual cases and contexts as important to understanding..." (p. 338). Likewise, Babbie and Mouton (2003) argue that I need to take into account the entire holistic view of where the research is conducted. This idea is reiterated by Maree (2007) who states that qualitative research needs to take place in the participants' real world setting and cautions that researchers must not attempt to change the context to suit their own means. Also, the idea that research conducted qualitatively needs to happen in the natural environment is expressed by Rule and John (2011) who cite Terre Blanche, Durheim and Painter (2006). Therefore, my research was conducted in the case study school where the participants were in their natural working environment.

In addition, a key indicator of qualitative research is the deep and meaningful data that is reflected. Bouma and Atkinson (1995) share these sentiments when they state that "...qualitative research is associated with depth rather than width..." (p. 215). Also, McMillan and Schumacher (2002) argue that qualitative research focuses on people's words, not on numbers. This idea is extended by Rule and John (2011) citing Terre Blanche, Durheim and Painter (2006) who argue that a key characteristic of qualitative research is the examination of people's feelings, experiences and situations that they find themselves in. Therefore, my research aimed to explore the phenomena of teacher leadership and teacher professionalism which indicated that the most suitable study employed was that of a qualitative nature.

3.3.3. Case study research

The research methodology that I employed in my research was a case study. Benavent (2005) states that the implementation of case studies as a tool for methodology is growing in its popularity in the educational sphere. A case study needs to have some sort of boundaries (McMillan and Schumacher, 2002; Stake, 2003; Silverman, 2010). McMillan and Schumacher (2002) citing Creswell (2000) offer an explanation for boundaries when they state that “...being bounded means being unique according to place, time and participant characteristics...” (p. 344). Furthermore, Silverman (2010) not only states that a case study needs to have boundaries but he also adds that these boundaries need to be made explicit at a very early point in the research. My research was conducted in an urban secondary school and focused firstly on all members of the staff in the survey component and then specifically focused on five teacher leaders on that staff.

Furthermore, both Bassey (1999) and Babbie and Mouton (2003) agree with the fact that when engaging in a case study, the researcher’s main focus is obtaining in-depth information focusing on a single unit or instance in action. Extending this idea, is the argument that a case study needs to also thoroughly analyse this single entity (McMillan and Schumacher, 2002). Furthermore, Bassey (1999) and Scholz and Tietje (2005) state that when employing case studies as the form of methodology in research, researchers’ need to be mindful of the fact that the context of the case is extremely important. Also, Maree (2007) reflects in the research that a key focus for case studies is to gain an overall “...understanding of how participants relate and interact with each other in a specific situation and how they make meaning of a phenomenon under study...” (p .75). I employed a case study as my methodology as my key aim for engaging in this research was to examine the perspectives on how teachers’ felt they could lead schools better to ensure that they become professional places of teaching and learning.

In addition, Stake (2003) makes a valid argument when he states that a case study is not only about the process of gaining the data from the research but it is also concerned with the end product of the investigation. This point is reinforced by Cohen *et. al* (2007) when they state that “...case study is concerned with rich and vivid descriptions of events...” (p.12). Benavent (2005) adds his explanation or definition about case study research when he states that this form of methodology is used to obtain detailed information either about a single individual or a small group of people. My case study looked at a small group of five teacher leaders, within

a specific school context with the intention of gaining rich and vivid information about the phenomena of teacher leadership and professionalism.

Bassey (2007) extends the idea of case study research when he offers the seven critical stages that a researcher needs to implement when conducting case studies as a research methodology. The first stage is to identify the research process. This stage is followed by asking either the single research question or the research questions that inform your study. The third stage is a critical stage because it considers the needs of the participants and the validity of your study, this stage involves writing up the ethical guidelines. The next stage is collecting your data and equally important to collecting your data is storing it in the correct manner. The fifth stage is one of the most difficult stages, as the researcher now needs to generate and test the various analytical statements. This stage is then followed by attempting to interpret and explain these analytical statements. The final stage of case study research will be to decide on the outcome of the case study and then to compile a report on your findings. These stages were critical to my case study research as they are systematic and needed to be implemented successfully.

3.3.3.1. The strengths and weaknesses of case study research

Case study methodology has various strengths and weaknesses. It was important for me to understand these various strengths and weaknesses before I decided to use it as my research methodology. According to Scholz and Tietje (2002) case studies are viewed by the majority of researchers very critically because they feel that researchers who conduct bad research or research without a definite design use the label case study for it. Furthermore, Bassey (1999) argues that even though the data collected in case study methodology is strong in reality it is very difficult to organise it. This argument is reiterated by the case put forward by Babbie and Mouton (2003) who state that "...the organization of case study findings is a serious challenge, given the amount of data collected for each case..." (p. 283). However, I discovered in the process of collecting my data that this can be managed efficiently if you are organised.

In addition, Scholz and Tietje (2002) and Cohen, *et. al* (2007) citing Nisbet and Watt (1984) all agree that it is very difficult to remain objective as a researcher conducting case study methodology regardless of the reflexive measures you implement there will always be issues of bias that arises. Also, Cohen, *et.al* (2007) citing Nisbet and Watt (1984) argue that one of

the key weaknesses in case studies is the fact that their findings cannot be generalizable. These researchers also point out another flaw in case study methodology when they state that the findings “...are not easily open to cross-checking, hence they may be selective, biased, personal and subjective...” (p.256).

However, there are also several strengths of case study research. Scholz and Tietje (2002) point out that the best research approach to implement if you are dealing with complex and contextualised issues is case studies. Also, Cohen, *et. al* (2007) who cite Nisbet and Watt (1984) argue that case study results are understood by the majority of the population because they are written in a manner that is easy to access and comprehend. These researchers, as well as Rule and John (2011) point out that case study methodology is a manageable task to take on because of its specific focus, a single researcher can take it on instead of an entire research team. I found this argument to be true as my case study was a task that was exciting, challenging but I was able to manage it effectively.

Furthermore, both Bassey (2007) and Cohen, *et. al* (2007) citing Nisbet and Watt (1984) agree that a strong point of using case studies is that it takes into account the realities or natural settings of the participants Bassey (2007) states that “...case study research entails being where the action is, taking testimony from and observing the actors first hand...” (p. 143). Rule and John (2011) extend this argument when they state that case study research does not deal with research at a superficial level because the researcher is engaged in a process of gaining rich and detailed information. They further state that this form of research is extremely flexible to implement and it can also be used in conjunction with other research approaches. I was aware of both the strengths and weaknesses of case study methodology before I chose it as my approach to conduct my research. However, I made a conscious decision to undertake case study methodology, as it was the most appropriate approach to employ to discover how my five teacher leaders viewed the ideas of teacher leadership, teacher professionalism and whole school development.

3.4. The participants

3.4.1. Sampling of the participants

The sampling of participants to engage in the research process is a critical and vital stage of research methodology. I employed purposeful sampling to select my participants as this form of sampling was the best method to adopt in order to gain a deeper understanding of how teachers can lead schools more efficiently to improve schools current status and turn them into professional places of teaching and learning. According to Babbie and Mouton (2003) purposive or judgemental sampling is the best form of sampling to implement if your research is based on "...your own knowledge of the population, its elements, and the nature of your research aims..." (p. 166). Fogelman and Comber (2007) develop this view by stating that purposive sampling is a huge improvement on convenience sampling because the researcher takes into account his or her own experience to choose their participants.

In addition, Rule and John (2011) claim that attempting to consult and involve every individual who is involved in a case is an impossible task. They extend this idea by stating that "...the researcher therefore has to choose people who can shed most light, or different lights, on a case..." (2011, p.64). They therefore claim that a researcher conducting a case study should implement purposive sampling and this form of sampling enabled me as the researcher to choose participants who were the most suitable to inform and enrich this specific research. Furthermore, McMillan and Schumacher (2002) extend this argument by stating a researcher's primary aim in the selection of participant's stage is to target individuals who will provide the study not only with appropriate data but rich and in-depth information. They further explain that these participants are "...likely to be knowledgeable and informative about the phenomenon of interest..." (2002, p. 351). Therefore, I chose purposive sampling as my method of sampling because it was the most appropriate means to implement to select participants who would provide me with the most rich, descriptive and accurate data.

3.4.2. Participants involved in the study

There were two groups of participants that were selected to participate in my case study research. At first, the entire staff was involved in the survey, right from the head of the school through to the post-level one educator. All members of staff were approached to complete a questionnaire and out of the entire staff of fifty-one, forty-three educators returned their questionnaires. The reason for asking the entire staff to participate in this stage of the

research was to gain an overall view of how teachers understand the key ideas of teacher professionalism, teacher leadership and whole school improvement.

The second group of participants that were involved in my case study research were five teacher leaders. It is important to mention at this point that the term teacher in this research refers to all members of staff regardless of the formal positions they hold. I decided to select only post-level one teachers as my five participants because I felt that these teachers reflected all the major elements of teacher leadership. I also made a conscious decision to select teachers that had studied further, were committed to their profession, worked collaboratively with others, teachers who were excited about innovation and change and individuals who were seen to go over and above the call of duty. I also decided to choose participants who belonged to different learning areas and were involved in a range of grades.

My unit of analysis for my study were five teacher leaders at my school. All these teachers are post-level one educators who take up various formal and informal teacher leader roles. They are enthusiastic, determined and motivated teachers, who love their profession and who constantly seek to improve their school and learners' performances. In addition, all five teacher leaders are females, with four of them belonging to SADTU and one teacher leader who is a NAPTOSA member.

3.4.3. Access

The research site that I chose to conduct my case study in was my own school. A very critical stage in any research is gaining access to the research site and participants. According to McMillan and Schumacher (2002) and Cohen, *et. al* (2007) before you even embark on your research project you need to take into account obtaining access and acceptance into the specific research setting. McMillan and Schumacher further develop this idea when they state that "...once access is approved, data collection can be planned and executed..." (2002, p. 348). These researchers also argue that the most crucial step in collecting your data is gaining access or entry into the field. Also, Cohen, *et. al* (2007) state that researchers need to also consider the fact that they need to obtain permission from the participants on their selected research site before attempting to embark on any form of data collection.

In addition, Silverman (2010) points out that a researcher conducting a case study is "...likely to choose any setting while demonstrating the phenomena in which you are interested, is

accessible and will provide appropriate data reasonably readily and quickly...” (p. 145). This argument is extremely valid because you cannot simply choose a research site because it is easy for you to gain access to it and gain permission from the participants but you need to allocate a setting that will provide you with rich, yet accurate data. Furthermore, McMillan and Schumacher (2002) explain that one of the key features of qualitative research is that it takes place in the participant’s natural setting where they behave in a normal manner.

My case study occurred at my own school from the period of November 2010 through to May 2011. Before embarking on any data collection, ethical clearance was obtained from the university. I then went in with all the necessary documentation to my principal asking for permission to conduct the research at my school. He gave his approval and the survey component of the research was carried out in the November 2010 period during two morning briefing sessions. All the interviews, individual and focus group, were conducted outside of school hours due to the fact of individual participants were extremely busy during the school day and I did not want to meddle with the academic or extra-curricular programme that they were involved in. The observations were conducted during school time and took place from November 2010, right through to May 2011. All participants were assured before the research started that their identities would remain confidential and anonymous. In addition, they could withdraw from the research at any point should they wish to do so. I gained informed consent from all my participants and access to my research site.

3.4.4. Positionality

Throughout my study I was aware of the fact that not only was I a researcher at the school but also a member of the staff. According to Rule and John “...it is important to be constantly aware of how you are positioned in relation to the study and participants, and how such positioning may influence the study and its overall quality...” (2011, p. 113). They offer a practical example, which reflected my reality when they state that some researchers who conduct research at their own campus find themselves taking up two roles simultaneously, one of being a researcher and the other as a member of that staff. Rule and John (2011) extend this idea of a researcher’s positionality by stating that a researcher needs to be aware of the impact of their power and status on the study, which they need to minimise, as this would in turn improve on the quality of the study. They further explain that measures that a researcher can implement to help minimise their power and authority is to be constantly transparent and honest about the effects of your positionality.

Similarly, Hopkins (2007) argues along similar lines when he states that “...those involved in research could usefully employ a transparent approach that acknowledges the continuing production, management and negotiation of positionalities and knowledges in different contexts...” (p.391). Furthermore, Bassey (1999) states that researchers working within the interpretivist paradigm are always aware of the fact that they are integral components in the research inquiry. Also, the concern raised by Moyles (2007) ties in with these arguments when he states the researcher in case studies that are conducted in that researcher’s natural setting cannot be mere observers or researchers because they are themselves teachers at that educational institution.

Furthermore, Hopkins (2007) and Rule and John (2011) argue that a key element to introduce to address the issues surrounding positionality is reflection and reflexivity. McMillan and Schumacher offer a definition for reflexivity when they state that it “...is a broad concept that includes rigorous examination of one’s personal and theoretical commitments to see how they serve as resources for selecting a qualitative approach, framing the research problem, generating particular data, relating to participants, and developing specific interpretations...” (p. 332). They further add that this process of reflexivity is a continuous process which needs to be carried out throughout the research process. These researchers extend this idea by stating that in order to become highly reflexive, a researcher needs to be constantly aware of the various factors that shape their research like their perceptions, paradigms and backgrounds. However, Moyles (2007) points out a positive aspect to conducting research in one’s own research site when he states that the researcher has an inside perspective which would inform that particular researchers recording of key events, keeping accurate field notes and analysing the data that was collected.

Therefore, when I engaged in my research I was fully aware of the fact that I was both a researcher at my school but also an important part of my staff. I made a conscious effort to reflect throughout the research process of my background and perceptions that informed my research questions, my choice of paradigm, research methodology and methods. In addition, I kept a field note journal from the beginning of my data collection, from November 2010, to the end in May 2011. I recorded in this journal once a week to constantly maintain my reflexive obligations.

3.5. Methods of data collection

Rule and John (2011) state that the methods that are implemented to collect the data are practical means of gaining the appropriate data. This argument is extended by Cohen, *et. al* (2007) and Maree (2007) who state that once you have decided on the methodology that you are going to use, the next step is the practical stage of collecting the data. Furthermore, Bassey (1999) offers four stages of conducting a case study. The first step is to examine the vital characteristics of the case. The second stage is to create valid interpretations of what has occurred. The next stage is to test how trustworthy these interpretations are. The final stage is to formulate a valid argument. Collecting the data or the methods of data collection fall into the third stage of Bassey's (1999) case study structure.

Therefore, in this next section I will discuss the five methods that I chose to implement to collect my data. The first method was a survey that was conducted in November 2010 which was administered to the entire staff. The second method was individual interviews that took place during February 2011 through to April 2011; these interviews targeted my five teacher leaders. The third method was a focus-group interview that involved all five teacher leaders, which took place in April 2011. The next method was observations, which took place throughout the research process that extended from November 2010 to May 2011. There were four areas of focus for observations, namely: staff briefings, staff meetings, staff development sessions and either a grade, phase, learning area or subject meeting. The final method that I employed was document analysis; this took place throughout the research process as it informed my observations and interviews.

3.5.1. A survey-questionnaire

The survey that was conducted as my first method of data collection was conducted in my school. According to Scholz and Tietje (2002) a questionnaire is one of the easiest methods of collecting data. Also, this method of data collection is a very old technique used in research (Babbie and Mouton, 2003). Furthermore, Briggs and Coleman (2007) argue that the most frequently used method in collecting data in education is surveys. This idea is extended by McMillan and Schumacher (2002) who state that the implementation of questionnaires as a research tool has grown in its popularity because it gains vital information from the respondents.

In addition, the questionnaire that was implemented was designed by the MED (ELMP) group and me. Scholz and Tietje (2002) offer valuable advice to researchers designing questionnaires, which we took into account. At first, they state that respondents need to have a common understanding of the phenomenon being discussed before completing the questionnaire, as this will allow the researcher to compare the various responses. Secondly, the questions asked need to be simple enough to be answered quickly, yet in an accurate manner. Also, the manner in which the questions are formulated needs to ensure that the responses provided are answering exactly what the researcher is questioning about. Furthermore, Babbie and Mouton (2003) claim that "...questions asked in a questionnaire should be relevant to most respondents..." (p.236).

Furthermore, the questionnaire that we designed was divided into four sections, namely: biographical details, school information, teacher leader and teacher professionalism questions and open-ended questions. Babbie and Mouton (2003) offer explanations for closed-ended and open-ended questions. They state that including close-ended questions is where respondents are limited in their responses but it allows for the researcher to process these responses more easily. The questionnaire that I administered had a section that was based on teacher leadership and professionalism, which used closed-ended questions. The linkert scale was used for the participants to choose from including a four for strongly agree, a three for agree, a two for disagree and a one for strongly disagree.

Also, Babbie and Mouton (2003) offer a definition for open-ended questions when they state that participants are "...asked to provide his or her own answer to the question..." (p. 233). The questionnaire that I used comprised of two of these open-ended questions in its final section. To continue, McMillan and Schumacher (2002) state that a questionnaire can be made up of questions or statements but the main purpose is to gain specific information about the phenomenon under study. My questionnaire used a combination of both statements and questions to gain an overall understanding of the teachers' perceptions, of teacher leadership, teacher professionalism and whole school development.

Next, Babbie and Mouton (2003) state that all questionnaires "...should contain clear instructions and introductory comments..." (p. 233). Our questionnaire had a front cover, with instructions and a note thanking the respondents for participating, as well as ensuring their

confidentiality. Also before each section there were clear instructions for the respondents to read before they completed that specific section.

In addition, I carried out my survey in a typical manner, which Babbie and Mouton (2003) states is where “...the researcher selects a sample of respondents and administers a standardized questionnaire to them...” (p. 231). I administered my questionnaire to all fifty-one of my staff members, forty-three of them returned them, which indicates a return rate of eighty-four percent. Furthermore, Babbie and Mouton (2003) and McMillan and Schumacher (2002) all agree that a questionnaire can be completed either by the respondents on their own or in the presence of the researcher. I was present when my respondents completed this questionnaire, which was completed during two briefings in the November 2010 period. The principal first informed the staff about my research interest, I then gave the staff a brief introduction about the study and then they completed their consent forms. The following day I administered the actual questionnaire, which I collected from them as soon as they were completed.

3.5.2. Individual interviews

The second method that I implemented to collect my data were individual interviews. The participants that were involved in these interviews were my five teacher leaders. The interviews were conducted during the period of February 2011 to April 2011. All the individual interviews were conducted after school hours, so as to not interfere with the academic or extra-curricular programme that the teachers were involved in. The participants were required to respond to a set of prescribed questions, which was recorded and the participants received a transcription of their responses to examine the information that they wanted to put across. Also, the interview schedule was designed by the MED (ELMP) group and me.

Interviews are a very important means of gathering detailed information and it was very important for my group and I to firstly examine exactly what an interview is, then to discover the aims of an interview and finally to assess the advice given to conduct a successful interview. According to Silverman (2010) qualitative interviews are conducted with a limited number of participants. My interviews only focused on five individual teacher leaders. Ribbins (2007) also points out that “...interviews entails the researcher broadly controlling the agenda and process of the interview, whilst leaving interviewees free, within limits, to

respond as they best see fit...” (p.209). The argument made by Rule and John (2011) reflect a similar line of thought when they state that the format of an interview is implied to be a one-on-one conversation between the participant and the researcher, which is done in a guided manner. This idea is extended by Maree (2007) who states that an interview is a two-way conversation to enable the researcher to gain information about the participants’ views, opinions and ideas. Furthermore, Maree (2007) states that interviews only take place during a limited period and is focused by predetermined questions. All five of my individual interviews only took place during a three-month period, where the participants were required to respond freely to a set of questions.

Secondly, it was important for my group and me to discover what the aim of interviews are before embarking on our research process. Babbie and Mouton (2003) argue that implementing interviews as a data collection method is indispensable because of the detailed data that emerges from it. They further point out that “...the interview encounter has the explicit purpose of one person obtaining information from another during a structured conversation based on a prearranged set of questions...” (2003, p. 249). However, Ribbins (2007) cautions the researcher that the main aim of conducting an interview is to discover the main thoughts and ideas of an individual, not to place our own preconceived ideas there. He further states that interviews are one of the only methods to implement if we wish to discover the views of others. In addition, Maree (2007) claims that an interviews main aim “...is always to obtain rich descriptive data that will help you to understand the participants’ construction of knowledge and social reality...” (p. 87). It was therefore evident that I needed to use interviews as one of my methods of data collection because I wanted to discover how my five teacher leaders felt they could lead schools better to ensure that they were professional places of teaching and learning.

Thirdly, it was equally important to examine the advice that different researchers offer in order to conduct a successful interview. Babbie and Mouton (2003) state that a researcher always needs to remember that an interview is a formal means of obtaining data, even though the manner in which it is conducted is very similar to having a normal conversation. These researchers also state that “...interviewers will need to watch your respondent’s non-verbal cues very carefully and then note and effectively interpret any changes in that behaviour...” (2003, p. 291). It is therefore not only important to keep detailed notes of what the participant is saying but also to acknowledge their behaviour patterns. In addition, Benavent (2005)

states that researchers must not only focus on one participant to gain a deeper understanding of the data. Furthermore, Maree (2007) offers researchers several guidelines for implementing successful interviews. He states that you need to find the most suitable candidates who will answer your questions the most accurately. You also need to give your participants a clear breakdown of your research and what your focus is. Also, the manner in which you interview an individual is of the utmost importance. Maree (2007) also states that “...good interviewers are good listeners who do not dominate the interview and understand that they are there to listen...” (p. 88).

3.5.3. The focus group interview

The third method that I used to obtain information from my participants was a focus group interview. This interview was conducted in the April 2011 period and included all five of my teacher leaders. The purpose of implementing this method of data collection was to gain a group perspective of the phenomena of teacher leadership, teacher professionalism and whole school development. The group were required to respond to a set of prescribed questions. This focus group schedule was designed by the MED (ELMP) group, including myself. In addition, the focus group interview was taped and each group interview was taped and each group member was given a copy of the transcription to access the accuracy of their responses. The focus group interview was conducted outside of school time, as the teachers did not want to cut into the academic programme and it was more convenient allocating outside time to gain a hundred percent attendance.

Focus group interviews are an instrumental tool to employ when conducting research, however, it is important to discover exactly what they are, what is the aim or objective for using them and to examine the advice offered by researchers before embarking on the actual research process. According to Litoselliti (2003) focus group interviews can either be used as primary or secondary data. Scholz and Tietje (2002) argue that focus group interviews fall into qualitative studies. This idea is extended by Ribbins (2007) who states that using group interviews in research is a very current phenomenon. Maree (2007) points out that “...the focus group interview strategy is based on the assumption that group interaction will be productive in widening the range of responses...” (p. 90). His argument behind this is that a group forum will stimulate the participants to respond effectively and could perhaps trigger some details that they might have forgotten. Furthermore, Rule and John (2011) offer a definition of focus groups by stating that it is a form of data collection where a researcher

engages a group of research participants together, where a detailed discussion is facilitated by the researcher.

In addition, a researcher needs to be fully aware of the main objectives of a focus group before engaging in it. Litoselliti (2003) points out several key aims for employing focus group interviews, namely: he states they are valuable because the researcher discovers new information; a variety of participants perspectives are introduced; the participants feel encouraged to voice their attitudes, views and beliefs and it allows the researcher to gain a deeper insight into the various perspectives of the participants. Babbie and Mouton (2003) also add that “...these focus groups are useful because they tend to allow a space in which people may get together and create meaning among themselves, rather than individually...” (p. 292). Maree (2007) extends this idea by stating that the data gained in focus group interviews is extremely rich and descriptive and it could be very difficult to produce this type of data using any other research method.

Furthermore, several researchers offer valid advice to researchers wishing to engage in focus group interviews. Babbie and Mouton (2003) state that a researchers' role is vital in conducting focus group interviews because they need to manage the group effectively and ensure that all participants are offered the opportunity of expressing themselves. They further suggest that a researcher needs to ensure that they have sufficient candidates participating or else the focus group interview will be a complete failure if the majority of the group remain silent. Furthermore, Babbie and Mouton (2003) caution researchers to avoid including participants who are very close friends, where the one friend feels that they are the experts and the other friend remains silent. These researchers also point out that it is impossible to manage a very large group because participants could start small conversations of their own. In addition, Maree (2007) states that focus group interviews are an excellent method to adopt but a researcher needs to provide a platform where the “...participants are able to build on each other's ideas and comments to provide an in-depth view not attainable from individual interviews...” (p. 90).

3.5.4. Teacher observation

The fourth method that I used to collect my data was observations. These observations took place during the period of November 2010 through to May 2011. There were four areas of focus, namely: staff briefings, staff meetings, staff development sessions and either grade, phase, learning area or subject meetings. The observations were semi-structured, which meant that there was an observation schedule used that was designed by the MED (ELMP) group but I also added additional information that stood out during the observations. The purpose of employing observations in my research was to assess if what the teachers were stating in their surveys and interviews were accurate with their actions. This would in turn provide me with greater detail on how teachers could lead schools better to ensure that they are professional places of teaching and learning.

Observations are excellent research tools but I needed to have a thorough understanding of what they are, the main aim for using them and to use the advice offered by other researchers before I could use them effectively. The method of observation that I used was participant observation, which Babbie and Mouton (2003) describe as observation “...where the researcher is simultaneously a member of the group she or he is studying and a researcher doing the study...” (p. 293). I was a researcher at my school but also a member of the staff. Babbie and Mouton (2003) state that this form of observation is one of the main techniques used by researchers conducting qualitative research. These researchers cite Kelleher (1993) when they explain that one of the main advantages for conducting observations is that it can be done in most settings. According to Cohen, *et.al* (2007) a key characteristic of conducting observations is that it allows researchers the opportunity to observe their participants natural social settings. Maree (2007) extends this argument by stating that “...observation is an essential data gathering technique as it holds the possibility of providing us with an insider perspective of the group dynamics and behaviours in different settings...” (p. 84). Similarly, McMillan and Schumacher (2002) state that observations are not only used to see but also to hear all the action that is occurring naturally in a specific research site.

Secondly, it was important for me to understand what the aim for conducting observations is before I implemented this method as one of my tools for research. Moyles (2007) states that observations are tools used in research that are real, extremely influential and can be easily adapted in various research settings. This researcher further points out that observations add another dimension to research because it does not focus on the participants response instead it

offers the observers perceptions. She also states that “...observations give direct access and insights into complex social interactions and physical settings...” (2007, p. 239). Also, both Moyles (2007) and Benavent (2005) argue that observations provide researchers with additional and descriptive data. In addition, Cohen, *et. al* (2007) argues that observations possess the potential to provide the researcher with more authentic data because it is conducted in a manner that does not include mediation. This idea is extended by Maree who states that observations “...allows us to hear, see and begin to experience reality as participants do...” (2007, p. 84). McMillan and Schumacher (2002) state that by conducting observations it affords the researcher the opportunity to obtain rich data from the participants about the specific research that is occurring. Furthermore, the idea that observations are a critical method used in case study research is expressed by Rule and John (2011).

Thirdly, I had to examine the advice offered by various researchers so as to conduct my observations effectively. Babbie and Mouton (2003) citing Kelleher (1993) argue that a researcher needs to constantly make detailed and accurate notes when embarking on an observation. They state that you must not only record what you see and hear but also include your own interpretation of what you observed. These researchers further point out that a researcher must not trust their memory because it is very untrustworthy; instead a researcher must take notes continuously. This idea is extended by Moyles (2007) who suggests that “...various means of recording can be used to support data collection...from making relatively unstructured field notes...through to using very defined and predetermined structured and systematic observation schedules...” (p. 245).

3.5.5. Document analysis

The fifth method that I employed in my study was document analysis. The reasons for using this method was two-fold, at first, together with my MED (ELMP) group we looked at various documents to draw up our survey, interview and observation schedules. We looked at documents such as the SACE ethical code for teachers to identify the key characteristics of teacher professionalism. My second reason for examining different documents was to assess if what my participants were stating were aligned with the various documents that shape their profession, such as the code of conduct for their particular union. This method of document analysis took place from June 2010 through to June 2011.

Furthermore, it was important for me to discover what document analysis really was and to find out the key reasons for employing it as a research method before I utilised it. According to Fitzgerald (2007) there are countless documents available that shape not only our personal lives but also our professional ones. He further explains that document analysis "...is a form of qualitative analysis that requires readers to locate, interpret, analyse and draw conclusions about the evidence presented..." (2007, p. 279). This idea is extended by McMillan and Schumacher (2002) who state that document analysis is a qualitative method of obtaining data with no or very little communication between the researcher and the participant. Furthermore, Rule and John (2011) point out that it is very useful to start with document analysis in the research process, especially if you are including other methods to collect your data.

In addition, it was important for me to discover the various reasons why researchers include document analysis in their studies before I introduced it into my study. According to Benavent (2005) the introduction of document analysis into a study "...serves to strengthen the evidence from other sources while they are also useful for making inferences about events..." (p.4). Also, Rule and John (2011) point out that there are a wide host of documents to choose from such as minutes, newsletters or reports, therefore the researcher will never be limited in their selection process. Furthermore, these researchers also caution future researchers who are considering including document analysis when they state that "...it is important to go beyond what the content of the document is saying and to also understand the document as a symbolic representation of the person or organisation it belongs to..." (p. 81).

3.5.6. Self-reflective journaling

I also included a field note reflexive journal in my research process. This journal was kept from the period of November 2010 through to May 2011. I ensured that I made an entry at least once a week where I reflected over the entire research process as it was unfolding. The reasons for me using this journal was it firstly, served as a tool which enabled me to constantly be reflexive and it also enhanced the reliability and validity of my study. In my entries I not only recorded the different stages that I was encountering in the research process but I also included my own interpretations, feelings and views about what was happening.

According to McMillan and Schumacher (2002) a reflexive journal is an excellent instrument to implement in research because it keeps a structured record of the decisions, modifications

and justifications that occurred during the research process. They extend this idea by stating that this tool “...traces the researcher’s ideas and personal reactions throughout the fieldwork...” (2002, p. 334). Also, Bouma and Atkinson (1995) argue that keeping a journal while conducting research is an excellent idea because we constantly forget things and by having a record of events it will alleviate this problem.

In addition, Bouma and Atkinson point out that by having detailed field notes, this will “...enhance the validity and reliability of research done within the interpretive paradigm...” (2003, p. 275). Also, Rule and John (2011) argue that by a researcher keeping a reflexive journal it helps to identify the important role that a researcher needs to encompass as a conductor of the case but also a constructor of that case. These researchers extend this idea by stating that researchers need to reflect critically on their research and focus on how they are progressing and what they are learning during their research process.

3.6. Data analysis

Data analysis is a crucial component in any research project. Rule and John (2011) define data analysis as a process “...which allows you to construct thick descriptions, to identify themes, to generate explanations of thought and action evident in the case, and to theorise the case...” (p. 75). This definition is extended by Watling and James (2007) who state that data analysis is a process whereby a researcher hopes to turn all their data that they have collected into ‘nuggets of pure gold.’ These researchers further reiterate that this process needs to occur throughout the research process, from the point of collecting your raw data right through to analysing it. Watling and James (2007) argue that the main aim for analysing data in the qualitative sphere is to search for interpretations, values and understanding. Furthermore, McMillan and Schumacher (2002) state that this process needs to be systematic in its “...process of coding, categorizing, and interpreting data to provide explanations of a single phenomenon of interest...” (p. 18). I was therefore aware of the fact that my data analysis process needed to be conducted in a thorough and systematic manner in order to identify and interpret the data that spoke to my phenomena of teacher leadership, teacher professionalism and whole school improvement.

In addition, I had both quantitative (survey) and qualitative (interviews, observations field note journal and documents) data to analyse. I introduced three different methods to deal

adequately with each form of data. Firstly, I used the SPSS programme to analyse the data that I collected from my surveys. According to Rule and John (2011) before embarking on analysing a questionnaire a numerical coding needs to be put into place. This was done by Dean Tyson and the co-ordinator of the MED (ELMP) group, which made the process of capturing the data a more manageable task because each question had a numerical value to it. I entered my questionnaire data onto the SPSS (Statistical Package for the Social Sciences) programme and was able to analyse my data into percentages and tables.

Secondly, I introduced content analysis to deal effectively with the data that I collected during my observations, interviews, reflexive journal, documents and the open-ended questions of the survey. Maree (2007) offers a definition of content analysis when he states that it is "...an inductive and iterative process where we look for similarities and differences in text that would corroborate or disconfirm theory..." (p. 101). This researcher extends this idea by stating that when conducting content analysis you have to be systematic in your approach because you are attempting to firstly identify and then summarise the major themes that emerge from your data. Furthermore, Silverman (2010) citing Dingwall (1992) states that when conducting content analysis there must be some correlation between the data collected during the interviews and the observations.

The third method that I used to identify the major themes, perceptions and views emerging from my qualitative data was coding. Rule and John (2011) point out that "...codes are labels that highlight different themes or foci within data..." (p. 77). These local researchers extend this idea by stating that the process of coding is selecting labels and allocating them to various sections of the data. The researcher needs to focus on what the data is saying and to divide the data into relevant labels. Rule and John (2011) state that the process of coding needs to be both deductive and inductive. This means that the researcher brings some codes into the process but also allows the data to 'speak' for itself and reflect codes of its own. Once this task is completed a researcher needs to look for similarities and differences or code absence in the various transcriptions, observations and documents. Rule and John (2011) then state that "...as the analysis proceeds, codes are grouped logically into categories which are given a name..." (p. 78). These categories I then used to write up about my findings from the study.

3.7. Ethical issues

Before embarking on my study I was fully aware of the various ethical principles that underpin any form of research, therefore I implemented several measures to ensure that my study was ethically sound. Rule and John (2011) argue that it is very important for a researcher to conduct their study in an ethically sound manner as this will increase the quality and trustworthiness of their research. They further point out that ethics “...flow from a system of moral principles embraced by a society or a specific community...” (2011, p. 111). Furthermore, Hopkins (2007) adds to this point by stating that ethics is underpinned by three key characteristics, which are involvement, consultation and participation. Also, the argument that ethics is basically deciding on what is right and what is wrong is voiced by McMillan and Schumacher (2002). These researchers add more detail to this definition by stating that a researcher needs also to be aware of the fact that there are measures that are proper and improper, the researcher needs to choose methods that are right and proper when conducting their research. Cohen, *et. al* (2007) extends these definitions by stating that in order to conduct an ethically sound research; a researcher needs to find a balance between pursuing their investigation and protecting the well-being of their participants.

In addition, when dealing with ethics several key issues need to be addressed, namely: gaining permission, autonomy and anonymity of participants, research causing no harm, research doing some good, validity, reliability and triangulation. According to Bassey (1999) permission needs to be gained from the participants, as well as gaining permission to publish the case report. McMillan and Schumacher (2002) also explain that “...informed consent is achieved by providing subjects with an explanation of the research, an opportunity to terminate their participation at any time with no penalty, and full disclosure of any risks associated with the study...” (p. 118). Similarly, Cohen, *et. al* (2007) argue that informed consent is underpinned by providing participants with full and thorough information involved in the research, participants must volunteer to participate and they must be competent and confident in their role. I first gained permission to access my research site, all my participants (first: the entire staff, second: five teacher leaders) all gave me informed consent and they all had a thorough and detailed account of my research.

Next, autonomy is a vital characteristics that underpins ethical issues. Rule and John (2011) offer an excellent definition for autonomy, when they state that “... [it is] ensuring participants’ privacy, confidentiality and anonymity...” (p.112). Furthermore, Babbie (1992) suggests that by being confidential it means that the researcher even though they are aware of

the fact of which data describes a specific participant, they do not highlight that fact. Similarly, Basse (1999) argues that participants' anonymity must be protected and guaranteed if the researcher wishes to increase or enhance the validity of their study. Likewise, McMillan and Schumacher (2002) state that when one discusses issues of ethics, one needs to protect the privacy of the participants. I ensured that my participants' identity and privacy was always protected. My survey had no place for respondents to fill in names and my five teacher leaders were given the names teacher leader one to five and pseudonyms to protect their identities.

Furthermore, a researcher needs to ensure that their study does not cause any harm if they wish for it to be critically sound. Rule and John (2011) state that research conducted should cause no harm to the process, participants, organisations or communities which are involved in the research. Babbie (1992) aligns himself with this argument when he states that research conducted should never injure a participant, regardless if they volunteered to be included in the study. McMillan and Schumacher (2002) state that a researcher needs to be open and honest about their research with the participants to avoid the participants entering into any harmful situations. This also means that participants must not feel forced or compelled to participate. These researchers declare that "...research should never result in physical or mental discomfort, harm, or injury to the participants..." (2002, p. 119). My research was conducted in an ethically sound manner, my participants were fully aware of my research intentions and not one of my participants was harmed in any way throughout my research process.

Also, research conducted should have a goal of wanting to do something good. Rule and John (2011) call this ideal 'beneficence' and they describe it as "...meeting obligations like providing feedback, follow-up or intervention if this was negotiated..." (p. 113). Similarly, Bouma and Atkinson (1995) argue that a researcher needs to inform their participants at first about the objectives of the study and then the results of the research. I was totally honest with all my participants about my research goals and intentions, furthermore I made my five teacher leaders read over their transcriptions of their interviews to assess if the information that they put across was actually valid.

In addition, Bush (2007) argues that "...the authenticity of educational and social research can be judged by the procedures used to address validity, reliability and triangulation..." (p. 91).

Bassey (1999) states that a studies validity is enhanced if the participants are provided with the opportunity to read over their transcriptions. According to Bush (2007) the ideal of validity is achieved if the research accurately addresses the phenomenon that it was intending to. Also, Maree (2007) points out that my studies validity is enhanced if the researcher includes measures such as “...crystallisation, member checks, long-term observation, peer examination, collaborative research and clearing research bias...” (p. 38). While conducting my research I was mindful of all the issues that would enhance my studies validity. My participants were provided with transcriptions of their interviews to assess their accuracy. All my research methods were designed to obtain data that spoke to my phenomena of teacher leadership, teacher professionalism and whole school improvement. I also included various methods to collect my data so as to address the issue of crystallisation. In addition, I did not work alone in designing my research instruments or formulating my research focus, it was a group project.

To continue, Bush (2007) citing Yin (1994) states that reliability in a case study is achieved if a new researcher embarks on a similar case study that you were researching, using very similar focus and methods, then they would end up with similar findings and conclusions. However, Fogelman and Comber (2007) argue that issues of reliability have to do with ensuring that the research instruments and methods are of a very high quality. Maree (2007) extends this idea of reliability by stating that it has to do with “...credibility, transferability, dependability and confirmability...” (p. 38). My study attempted to address these issues of reliability by ensuring that all my research instruments were of a high quality and should they ever be needed in a future study, they are readily available.

Furthermore, I included several methods of data collection ranging from surveys to interviews to address the issue of triangulation. Bush (2007) offers a definition for triangulation when he states that it “...means comparing many sources of evidence in order to determine the accuracy of information and accuracy...” (p. 100). Babbie and Mouton (2003) offer practical examples of what methods to employ to enhance triangulation. They state that a researcher can write extensive and detailed field notes, they can ask their peers to examine the research tools, researchers can also ask peers to examine the research design and ensure that they leave an audit trail for justification.

3.8. Limitations of the study

Rule and John (2011) argue that in order for a research to be considered responsible and of a high quality a researcher should be honest about their limitations but also state what measures they introduced to help minimise these limitations impact. The first limitation that I encountered was selecting a case study as my research methodology. According to Rule and John (2011) case study research “...does not allow findings to be generalised to the entire population of cases...” (p. 110). However, this was not my intention for conducting a case study; I wanted to explore the ideas of teacher leadership and professionalism, as well as whole school development, as it was experienced at my school. The second limitation that I discovered while conducting my research was my positionality of not only being a researcher but also a member of staff. The measure that I implemented to address this issue was to keep a detailed reflexive field note journal. Another limitation in my study was selecting my school as my research site but it was the most convenient, allowed me the opportunities to conduct my observations accurately. However, I did not meddle in the academic or extra-curricular programme at my school; all interviews were conducted outside of school time. Time limitations was one of the issues that arose during my research process because of the demand of the profession on my five teacher leaders, however, as I have mentioned all my interviews had to take place outside of school hours.

Furthermore, I experienced limitations with four of my research methods. According to Babbie and Mouton (2003) one of the limitations of implementing a survey as a research method is that respondents are most likely not to share their opinions because they think that they are the only ones that share this view. I attempted to address this issue when explaining my research to the staff and stating that I value every person’s input and ideas and I would appreciate it if they were totally honest. In addition, their identities were confidential and because it is a large staff, it will be almost impossible to distinguish their individual responses.

The second method of data collection that I discovered a limitation in was my individual interviews. Babbie and Mouton (2003) point out that conducting individual interviews could render a problem because “...understanding the meaning construction process of others is a slow and extremely delicate process...” (p. 291). The methods that I implemented to address this issue was to probe my participants during their interviews, as well as to thoroughly observe their actions and behaviour during my observation process, in the hope of

discovering the sources of their thinking pattern. In addition, while conducting my document analysis, if there were words or phrases that were reflected in both my participants' interview and the documents, I would surmise the source of their views.

The focus group interview also provided me with a key limitation in my study. According to Litoselliti (2003) when conducting a focus group interview, a researcher can come across participants that have strong and powerful personalities who could control the entire focus group session. I was aware of this fact and when I embarked on my interview, I ensured that I constantly involved all five of my participants. When there were only one or two teacher leaders responding, I would target those who were silent to find out their views and discover if they were in agreement or not with the group.

According to Babbie and Mouton (2003) a limitation of using observations as a research method is that "...you'll inevitably wonder how much you should record..." (p. 295). I decided not only to use the observation schedule that was designed but also to discuss the specific observation in detail. My reasoning behind this was to rather have too much detail, then to attempt to think back to that specific situation to gather more.

Furthermore, Benavent (2003) argues that a serious limitation when conducting a case study is the issue of construct validity. However, he offers suggestions to help alleviate this problem when he cites Yin (1994) who proposes three remedies "...using multiple sources of evidence, establishing a chain of evidence, and having a draft case study report reviewed by key informants..." (p. 3). Similarly, Silverman (1997) states that a studies quality is increased with the introduction of multiple methods. I implemented all these suggestions in my study, I used six methods of data collection, all my transcriptions are available electronically as well as audio-cassettes and my case study report has been constantly examined by various supervisors, specialising in my field.

3.9. Conclusion of the chapter

This chapter focused on my research design and methodology. There were several areas of focus, namely: my research aim and questions; my research methodology; the context of my study; the methods I used to collect my data; data analysis; ethical issues and the limitations of my study. It is important for me to comment now that this research process was an extremely empowering and exciting endeavour, especially for a novice researcher. It did have

its challenges and obstacles but overall it was a rewarding experience to discover hands-on, how teachers felt they could lead schools better to ensure that they are professional places of teaching and learning. In the following chapter I will present and discuss the findings of my research.

CHAPTER FOUR: DATA PRESENTATION AND DISCUSSION OF THE FINDINGS

4.1. Introduction to the chapter

Every individual, globally and locally, all has one main objective and that is to experience a quality and fulfilled life. In order to reach this dream or goal you need to have a solid education as this is the key to a successful future. However, education is bombarded with major obstacles and a challenge which makes this dream a difficult reality to achieve. It is for this reason that I embarked on my research to help identify solutions to eradicate the inequalities that exist in society and help to make effective teaching and learning a reality for all. It is my personal ontological assumption that quality education can be achieved if teacher leadership and teacher professionalism are practiced in all educational institutions. I, therefore align myself with the argument put forth by Darling-Hammond, Bullmaster and Cobb (1995) who state that “...teacher leadership is potentially more than a role, it is a stance, a mindset, a way of being, acting and thinking as a learner within a community of learners and as a professional teacher...” (p. 98). This idea is extended by Sachs (1999) who suggests that teachers who behave in a professional manner are the ones that work well with others and co-operate with all the major people involved in educational success.

Therefore, in this chapter I present the data to reveal the findings and themes that emerged from the survey, observations, individual interviews, focus-group interview, document analysis and self-reflexive journal of the five teacher leaders in the case study school. The data revealed how teacher leadership and professionalism was enacted in the case study school, as well as identified what factors either enhanced or inhibited these ideals. I found it extremely worthwhile to interpret my data through the lens of distributed leadership. Therefore, I aligned myself with the thinking of Spillane (2004) who suggests that “...leaders’ practice is distributed across the situation of leadership, that is, it emerges through interaction with other people and the environment...” (p. 8). I also used the ideas expressed by Gunter (2005) who states that distributed leadership can be found in three forms; which are authorised, dispersed and democratic. Furthermore, I then juxtaposed this framework by adapting a more in depth focus on teacher leadership and professionalism as described by Muijs and Harris (2003), Sachs (1999) and Grant (2008), among other prolific writers.

In addition, this chapter offers a brief glimpse into the lives of five teacher leaders who offer their views on how teachers can lead schools better to ensure that they are professional places

of teaching and learning. The chapter will begin by describing the case study school and then introduce the reader to the five teacher leaders. It will then focus on the major themes that were highlighted in the study which will fall into four major categories; namely: teacher leadership, teacher professionalism, factors promoting teacher leadership and professionalism and factors inhibiting teacher leadership and professionalism and I conclude with a summary of the main findings.

To remind the reader, I reiterate my research questions:

Core Question: How can teachers lead schools better to ensure that they are professional places of teaching and learning?

Subsidiary Questions:

1. How is professionalism understood by teachers?
2. What are the factors which enhance or inhibit teacher leadership and professionalism in schools?

To recapitulate the process of collecting data, the table below is included and offers clarity to dates of collection, the various techniques implemented for collecting data and the codes allocated to the participants.

DATA METHODS	COLLECTION	PARTICIPANT (S)	DATA COLLECTION DATE (S)
Survey		Entire Staff (ES)	06 December 2010
Individual Interviews		Teacher Leader 1 (TL1): The Liberator	24 February 2011
		Teacher Leader 2 (TL2): The Motivator	09 March 2011
		Teacher Leader 3 (TL3): The Mediator	28 March 2011
		Teacher Leader 4 (TL4): The Persevere	28 March 2011
		Teacher Leader 5 (TL5): The Liberator	01 April 2011
Focus Group Interviews		Teacher Leaders 1,2,3,4,5 FG	01 April 2011
Document Analysis		Researcher	December 2010-November 2011
Observations		TL 1,2,3,4,5 and ES	November 2010- May 2011
Field Note Journal		Researcher	November 2010- May 2011

Furthermore, I also make use of the following key to indicate the sources of the evidence that were assimilated during the research process:

- Individual Interviews (II)
- Focus Group Interviews (FGI)
- Observation Schedule (OS)
- Field Note Journal (FNJ)
- Documents (D)

4.2. An institutional sketch of participating school

The study was undertaken in an urban school in Pietermaritzburg. This school falls under the Umgungundlovu district in the province of Kwazulu Natal. It is a co-educational secondary school, which is classified as a Section twenty-one school. The annual school fees are one-thousand rand, per learner but there are discounts available for a three-month payment in full or if our learners have siblings at the school. This school was originally opened in June 1983 as a school that fell under the House of Representatives, which during that period was the 'Coloured' department for educational affairs. This meant that the only learners that were permitted into the school were classified 'Coloured.'

However, in the 1990's the school transformed with the introduction of a new democratic government. Currently, there are one thousand, five hundred and three learners of which approximately seventy-five percent are 'African' learners and the remaining twenty-five percent are 'Coloured' learners. This creates a diverse and rich culture at the school, where learners come from different backgrounds but share in a collaborative culture of learning. The majority of our learners come from very low socio-economic backgrounds where some learners are being cared for by their grandparents, who depend solely on their pensions, whereas others live in child-headed households and need to depend on grants in order to survive. It is for this reason that approximately thirty-five percent of our learners are exempt from paying school fees. In addition, in 2006 my school had to look for private donations to set up a feeding scheme at school, as secondary schools do not receive any state funding. For some learners the meal that they receive at school is sometimes their only meal for the day.

Furthermore, there are fifty-one educators on staff, which is one of the biggest numbers of staff in Pietermaritzburg. Of these staff members forty-eight are state paid and the remaining

three are governing body appointed. We have one principal, two deputy principals and five heads of departments, which constitutes eight members of the school management team. Each head of department is in control of a specific learning area and a specific grade. The staff at my school is extremely vibrant, creative and enthusiastic and there is a culture of professional development, with the majority of the staff currently engaged in additional studies or having completed various certificates, diplomas or degrees.

Also, we have a very active extra-curricular programme that exists at my school. We offer the majority of sporting codes at the school and have produced very strong soccer, hockey and netball teams. In addition, we have also excelled on the cultural sphere as well, with many of our plays and dances receiving awards and winning local competitions.

My school has also excelled academically, considering the vast differences in backgrounds that our learners emerge from. The majority of our learners speak isiZulu mother-tongue but the medium of instruction at the school is English. We have always received eighty-five percent and above pass rate, which is an excellent reflection considering the reality of our learners. In addition, in 2009 the school hosted its first golf day which raised considerable funds. These funds were used to update our security system at the school, as well as to start up different drives, which the teachers were interested in. The funds raised in 2010, will be put together with the money raised in 2011 to cover the assembly area, as the school does not have a school hall.

4.3. The profiles of the teacher leaders

In this section I offer a profile of each of the five teacher leaders in order to contextualise their professional backgrounds, personalities and to offer the various leadership roles they engage in within the case study school.

4.3.1. Teacher Leader 1: The Liberator

The Liberator is a thirty-eight year old Coloured female who is in a long-term relationship and a mother of an adorable five year old. She is a grade ten class teacher and teaches English Home Language to grade ten's and grade twelve's. The Liberator is currently teaching for fourteen years, seven of these years were spent teaching English First Additional Language in a rural school in the Midlands Meander. When she started teaching at this school there was only a ten percent pass rate but with her dedication and motivation she reached ninety

percent. She now teaches at her current school for seven years and has served on various committees at school, where she is currently the chairperson of the fundraising committee.

Liberator has recently completed her BED Honours, specialising in Social Justice. She is very passionate about social justice issues where she feels that schools need to become: “*A socially just environment where everybody is free to learn, free from intimidation, free from violence, a safe secure environment, where one can express oneself, not matter the creed, your race, your gender, your sexual orientation or your class...*” (II, p. 4). I chose the pseudonym Liberator for her because her ultimate goal is to achieve equality in education. Furthermore, she is involved with various learner committees and clubs, such as the debating team and poetry club, where she sacrifices most of her break-times and afternoons to these endeavours. My key reason for selecting this teacher leader to be involved in my study is because she goes over and above the call of duty to ensure that learners placed under her care are given quality instruction in addition to love and support.

4.3.2. Teacher Leader 2: The Motivator

The Motivator is a thirty-eight year old female. She is a single parent to a vibrant eleven year old and always puts her greatest effort into all endeavours. Motivator is currently teaching for sixteen years and has taught both in the Gauteng and Kwazulu Natal provinces. The Motivator is a grade twelve class teacher and she teaches grade eight Natural Science and grades ten, eleven and twelve Life Science. She has completed her ACE certificate in Adult Basic Education. Motivator reflects teacher leadership and professionalism in all spheres of her profession. She is involved in many committees that exist at my school, such as the discipline committee, as well as serving as a coach and organiser for the athletics and girls’ basketball team.

I chose the pseudonym Motivator for her because she is constantly motivating her peers and learners to be the best that they can be. There was an instance during a staff briefing session where the principal was discussing the filth in the school. The Motivator encouraged all the educators to keep the school clean and came up with an idea of having an incentive put forward to the school, that if the school remains clean for a month then learners would be given a half day (OS, p.10). The staff and learners were excited to take on this new initiative because they were motivated to work. My reason for selecting this teacher leader is because she stands out from the rest of the staff as being an individual that wants to change her

learning community for the better. Her goal is to teach at an institution: “*Where learning comes easier to learners and where teaching is made to be easier...*” (II, p. 7).

4.3.3. Teacher Leader 3: The Mediator

The Mediator is a forty-one year old single female on my staff. She is currently teaching for six years and is studying her BED Honours, specialising in Professional Development. Mediator went into teaching because: “*I came from that background, my mother was a teacher and she instilled that love of teaching inside of me...*” (II, p. 9). The Mediator is a grade nine class teacher and teaches grade eight and nine Technology. In addition, this teacher leader serves on several committees such as the staff development team. She is intrinsically involved in the holistic development of learners and is the grade co-ordinator for school photographs, as well as a coach for the athletics.

I chose the pseudonym Mediator for this teacher leader as she serve as a mediator between the learners and teachers, as well as between teachers and management. During one of our staff briefing sessions she raised her hand to voice the concerns shared by the majority of the staff over the issue of athletics training. Many of the teachers felt that they are eager to participate in athletics training but did not want to be out every single day. She came up with the idea of a ‘buddy-system’ where teachers would alternate with a friend or peer from their respective athletics house to either stay in class with the learners not participating in athletics and those learners training (OS, p. 6). The reason why I chose the Mediator in my study is because she constantly intervenes in situations to come up with the best possible solutions for all.

4.3.4. Teacher Leader 4: The Persevere

The Persevere is a thirty-five year old, single female who has been teaching for six years. She has a daughter who is nineteen and is currently in her first year of university. This teacher leader started off her working career as a domestic worker where she saved money to study her BED at university; she persevered through hardships and trials to become an educated individual. She is a grade nine class teacher, who teaches grade ten, eleven and twelve Life Orientation. The Persevere has completed her ABET certificate and is involved in all spheres of the school. She is the driving force behind the Peer Counselling at our school and she selects learners annually to participate in ‘Take a girl child to work’. In addition, she serves on the athletics and fundraising committees.

The reason I chose the pseudonym Persevere for this teacher leader is because she persevered through difficult periods to achieve her goal and she encourages her peers and learners to take on this character trait to realise their dreams. I chose her to be in my study because she is an extraordinary individual that wants her school to be: “...*a creative and dynamic place where all staff members and learners needs are considered...*” (II, p. 10).

4.3.5. Teacher Leader 5: The Innovator

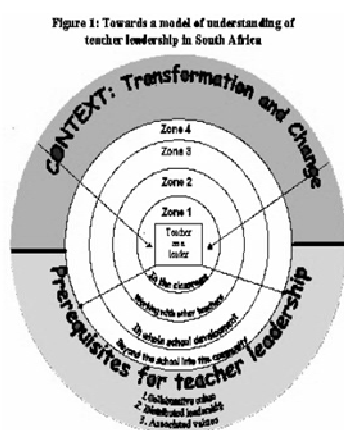
The Innovator first taught unqualified for three and a half years before enrolling as a full time student for her BED. She completed her degree at the top of her class and passed ‘Sum Cum Laude’. Currently, the Innovator is completing her BED Honours, specialising in Education, Leadership, Management and Policy. She is teaching for two years and she teaches grade ten and elevens Economics and Business Studies. This teacher leader is a grade ten class teacher and offers free additional classes on some Saturdays and holidays for grade eleven Economics. In addition, she is a valuable member of the fund-raising committee and the staff development team. She is also the swimming co-ordinator for the swimming team, where her tasks include coaching, selecting and administration. This teacher leader is thirty years old, happily married and a mother of a loving eight year old boy.

The reason why I chose the pseudonym Innovator to describe this teacher leader is because she constantly comes up with innovative ideas and recommendations to improve the overall situation at our school. During a staff development meeting she suggested that we organise a staff building activity, off the school campus (OS, p. 11). This idea came at a crucial period as staff morale was at an all time low due to the fact that teachers’ salaries were being docked, demands of the profession and an overall sense of dissatisfaction. I chose her to be included in my research because she is a dynamic and creative individual who is passionate about educating learners because her personal philosophy is: “*When I know better, I can become better...*” (II, p.14).

4.4. Teachers’ experiences of teacher leadership

In the following sections data drawn from this study reveal that in the case study school teacher leadership is experienced in four different spheres, which are in the teachers’ individual classrooms, the collaborative relationships that teachers share, within the school and within the learning community as a whole. This finding ties in with the model designed by Grant (2006) where she describes teacher leadership occurring in four zones: in the

classroom, working with other teachers and learners outside the classroom, outside the classroom in whole school development and between neighbouring schools in the community. Also, the study depicted teachers taking up teacher leadership in both formal and informal roles. Formal leadership is where educators are formally placed into positions of leadership, like a subject coordinator. Informal leadership is where educators take control over activities such as athletics or discipline committees without being formally placed there.



Teacher Leadership	
First level of analysis: Four Zones	Second level of analysis: Six Roles
One In the classroom	One: Continuing to teach and improve one's own teaching
Two Working with other teachers and learners outside the classroom in curricular and extra-curricular activities	Two: Providing curriculum development knowledge Three: Leading in-service education and assisting other teachers Four: Participating in performance evaluation of teachers
Three Outside the classroom in whole school development	Five: Organising and leading peer reviews of school practice Six: Participating in school level decision-making
Four Between neighbouring schools in the community	Two: Providing curriculum development knowledge Three: Leading in-service education and assisting other teachers

Grant, 2006, p63

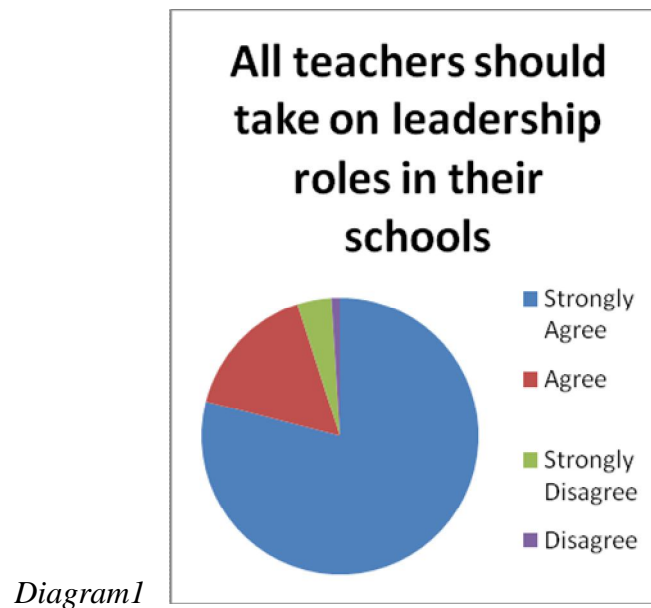
However, the findings also revealed that although the majority of teachers believed that teacher leadership was practiced in their school, they felt that there were elements of superficial leadership that was dominant.

4.4.1. Perceptions of teacher leadership

My five teacher leaders participating in the study all agree with the fact that teacher leadership is a reality at their school. Liberator voiced her view of teacher leadership by stating that *"I think that every teacher is a leader in some capacity"* (II, p.1). This view is reiterated by the sentiments shared by Mediator when she argues that *"As a teacher, you have got to be a leader"* (II, p.8). This finding ties in with the argument made by Barth (1988) who argues that all teachers have the potential to lead. It also ties in with the research conducted by Harris and Muijs (2005) who suggest that teacher leadership needs to be a practice experienced by the majority of the staff not only the minority.

Furthermore, the observations conducted throughout the research process indicated that all the teacher leaders included in the study were engaging with various forms of teacher leadership at different times. During a staff briefing session that was conducted on the 06 December 2010, Innovator voiced her opinion over school assemblies. In the past the assembly period, which occurs every Monday, was taken by the principal. Innovator suggested that every class be assigned a turn to take the assembly, where they will be in charge of the overall theme for that particular assembly in terms of the song choice and message. This idea was welcomed by the staff as they felt that it would offer the learners a platform to express themselves in a new and vibrant manner (OS, p. 2). Teacher Leadership was also reflected in a learning area meeting that occurred on the 18 January 2011. The issue of concern during this meeting was the academic decline of the language department. Liberator came up with some brilliant suggestion on a positive way forward; she stated that peer teaching is an excellent method to implement in such a huge department where there are more than three teachers per grade teaching that particular language. She stated that sometimes your experience as a teacher makes you more vibrant and confident in certain sections of your work, whereas you lack the expertise in others. Liberator appealed with the Language Department to use each others expertise for the overall achievement for their learners (OS, p. 5). These observations reflect the argument made by Grant (2005) who states that “...our schools need leaders who are courageous, unafraid to take risks and who can use their initiative and work collaboratively with people in achieving the shared school vision...” (p. 9).

In addition, the Government Gazette (2000) that outlines the seven roles that a teacher needs to encompass clearly states that all teachers need to be leaders, managers and administrators in their schools. This role was reflected by the majority of the staff in the case study school, 79% of the participants involved in the questionnaire strongly agreed that all teachers should take on leadership roles in their schools, whereas only 5% felt that teachers should not be teacher leaders.



4.4.2. Teacher Leadership within the classroom leads to effective education

The majority (80%) of the five teacher leaders indicated that you need to be a leader within your classroom. Liberator stated that *“In your classroom you are a leader, you are the disciplinarian”* (II, p. 1). Her statements were extended by Mediator who commented that *“You are leading within your class and those children are then compelled to follow a leader because if you are not a leader within your classroom they are going to walk all over you”* (II, p. 10). This finding ties in with the work of Rogus (1988), Harris and Lambert (2003) and Grant (2008) who argue that teacher leaders have to be leaders within their classrooms. Harris and Lambert clearly state that *“...teacher leaders are in the first place expert teachers, who spend the majority of their time in the classroom but take on leadership roles at times when development and innovation is needed...”* (2003, p. 88).

Also, this finding is reflected in the observations that occurred during the research process. Liberator loves teaching poetry and is also very dynamic when it comes to explaining the themes, figures of speech and structure of poetry. A particular colleague of hers was finding difficulty in explaining a particular grade twelve poem to her learners. She approached Liberator and explained to her that her classes were not fully grasping this poem. Liberator took it upon herself to set up all the grade twelve’s in the hall and explain the poem to them (OS, p.14). Furthermore, all the teacher leaders involved in the study have excellent classroom control, as well as an excellent rapport with their learners. All five of them are constantly sought out by their peers as teachers available for time outs for problem learners

(OS, p. 17). Therefore, this finding suggests that teacher leadership needs to be practiced in teachers' individual classrooms to enable them to lead schools better to ensure that they become professional places of teaching and learning.

4.4.3. Teacher Collegiality leads to professional places of teaching and learning

All the participants of the study revealed that working well with others was a key characteristic of their professional success. In the focus group interview Mediator suggested that *"There is a collaborative culture that exists at my school"* (FGI, p. 4). This idea was extended by Motivator who stated that *"I think that within our learning areas we are given the opportunity to grow and take initiative"* (FGI, p.4). Persevere also remarked that *"Not only in our learning areas but also within our grades we are given the opportunity to express ourselves and to learn from others"* (FGI, p.4). This finding ties in with the work of Gehrke (1988), Harris and Muijs (2005) and Timperley (2005), among other prolific writers, who all agree that a key characteristic of teacher leadership is collaboration. Gehrke (1988) puts it perfectly when she states that *"...teacher leadership is characterised by a form of collective leadership in which teachers develop expertise by working collaboratively..."* (p. 43).

Likewise, in my self reflexive journal I commented on the 25 April 2011 that we had a learning area meeting regarding the approaching exams. My department really handles these issues in a professional manner. There were no arguments or people avoiding to work on the task at hand. Instead a polite conversation took place and all educators took on their respective role. Furthermore, while I was observing a grade meeting on the 24 January 2011, the element of collaboration was revealed. The HOD was discussing problem learners in grade nine. Mediator and Persevere together with the other grade nine class teachers came up with the solution that all the problem learners belonged to one class. They accounted for their behaviour by suggesting that because these learners have been together from the primary school phase that they are too familiar with each other and cause constant disruptions. The grade nine teachers suggested separating these problem learners across all the ten grade nine classes and for these learners to carry around personal log books for teachers to comment on their behaviour. If this measure does not work then more drastic action would ensue (OS, p.3). This was a clear example to suggest how teachers worked well together. Therefore, this finding suggests that teacher collegiality leads to schools becoming professional places of teaching and learning.

4.4.4. Teacher Leadership within the school leads to effective education

This study revealed that teacher leadership was also practiced within the school context, four of the five participants indicated in their interviews that teacher leadership exist in their institution. In Motivator's interview she stated that "*Certain aspects of what is taking place in the school I am able to give input and also come up with suggestions that other colleagues or educators put into practice and find that they actually work*" (II, p. 7). Innovator also commented in her interview that "*If I see there is a need within the school I try to address it*" (II, p.15). This finding coincides with the work of Lieberman and Miller (2004) who suggest that "...teachers performed their leadership in the context of their school..." (p. 17). Likewise, Spillane (2004) suggests that there needs to be three elements at work if distributed leadership is to be a success, these are the leaders, the followers and the school context or situation.

Likewise, the staff development session that was observed on the 21 May 2011 also reflected the ideal of teacher leadership being practiced within the case study school. The case study school hosted the annual quadrangular tournament and it was a huge success because the majority of the staff took on various leadership roles such as catering, first aid, sports code convenors and fundraising members. Educators were not prescribed specific roles, instead they took ownership of initiatives that they were interested in. The staff worked well together and not only was the day a success the host school also won the tournament. This element of teacher leadership is highlighted by the work of Darling-Hammond *et. al* (1995) who argue that "...in this leadership paradigm, teachers develop expertise according to their individual interests..." (p. 94).

Furthermore, the survey completed by the staff of the case study school revealed that when posed the question that the majority of teachers in my school take up leadership roles, the majority of the staff agreed with this point, 25,6% agreed and 39, 5% strongly agreed. Also, when asked the question if only people in formal positions of authority should lead, the majority of the staff disagreed with this statement, 44, 2% strongly disagreed and 34, 9% disagreed. Therefore, this finding suggests that teacher leadership needs to be practised throughout the school if schools are to develop into professional places of teaching and learning.

4.4.5. Teacher Leadership within the community leads to a professional and effective environment

A key finding highlighted in this study was the idea of teacher leading in their communities as well. In Liberator's interview she stated that "*I was surrounded by rural women who a lot of whom were uneducated and also illiterate. They come to you for leadership*" (II, p. 2). Persevere also commented in her interview that "*I am a leader in the community. When you are a teacher everybody thinks that you are the main person, they come to you for advice and if they need something to be written they also come to you*" (II, p. 11). This finding ties in with the argument put forth by Grant (2008) who suggests that teacher leadership must not be confined by the boundaries of the school but needs to be fostered within the community and surrounding schools. It therefore points out that teachers are to become leaders and professionals within their learning community in order to improve on the conditions in schools.

4.4.6. Superficial teacher leadership

This study also revealed that two of the five of participants felt that they were involved in only superficial leadership tasks and that they were not really influential in the major leadership activities that exist in the school. Liberator voiced her view by stating that "*I've never really led people in the large groups it's always been very isolated small committee's*" (II, p. 2). Innovator also added that "*I think the majority of staff where I teach we are engaged in superficial leadership tasks*" (II, p.10). This finding tie in with the research conducted by Grant (2008) who argues that in some schools teachers feel that there "...is a lack of teamwork, collaboration and shared vision..." (p. 99).

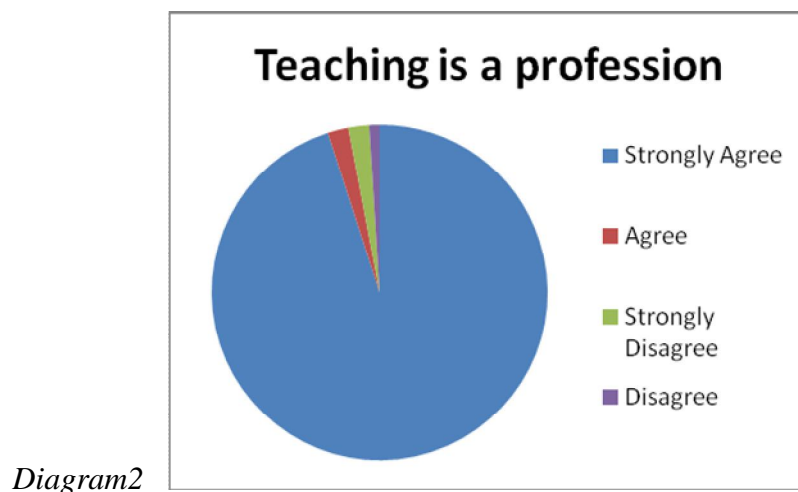
4.5. Teachers' understanding of professionalism

In the sections below data drawn from this study highlight the various perceptions of the five teacher leaders regarding the concept of teacher professionalism. The participants suggest that there are various factors at play that shape an individuals idea of professionalism. These are formal training, the status of the profession, teachers' skills, knowledge, background, motivation and the relationships shared by all the major educational stakeholders at an institution. All these key findings tie in with the argument made by Broadfoot, Osborn, Gilly and Paillet (1988) who suggest that a teacher's context, ideologies and perceptions all play a pivotal role in shaping their overall understanding of their professional demands.

4.5.1. Perceptions of teaching as a profession

This study revealed that four of the five participants all agree that teaching is definitely a profession. Liberator commented in her interview that *“I think that teaching is definitely a profession”* (II, p. 1). This finding was also touched on by Mediator who stated in her interview that *“Personally, I would like to think that teaching is a profession”* (II, p. 13). This view was also reinforced by Innovator who voiced her opinion by stating that *“I think teaching is a profession because you cannot just take anybody from the street and ask them to go and teach”* (II, p. 18). This finding ties in with the Hoyle (1982) and Sachs (1999) who both argue that teaching is definitely a profession because it plays a crucial role in the way society functions.

In addition, the survey that was conducted in the case study school that included all the members of staff as participants revealed that an overwhelming majority of the staff agreed with the fact that teaching is a profession. 95% of the participants strongly agreed with the question, 2% agreed and only 3% of the participants felt that teaching was not a profession.



Furthermore, the focus group interview reiterated the finding that teaching is viewed as a profession. Innovator added a further dimension onto this ideal by suggesting that *“Teaching is definitely a profession because when we think of the term professionalism we are essentially dealing with two aspects. Implicit professionalism, we need to have autonomy in terms of self-governance. Explicit professionalism where we project certain image...”* (FGI, p.2). This view is also expressed in the SACE (2006) document when it discusses teacher

professionalism as being a role that requires an individual to be autonomous and accountable for their decisions.

4.5.2. Formal training of teachers is a key characteristic of professionalism

This study revealed that two of the five participants felt that you need to study or have formal training in order to carry out your professional requirements effectively. Liberator voiced her opinion when she stated that “*We have to study to become teachers*” (II, p.1). Persevere also shared in these sentiments when she explained that “*You have to study and become qualified to teach*” (II, p.8). This finding coincides with the work carried out by Hoyle (1982) who states that “...the period of education and training also involves the process of socialization into professional values...” (p. 20). In other words you will not understand the core principles and values that underpin this profession if you have not undergone any form of training.

Also, during the course of document analysis which was conducted throughout the research process it was revealed that teachers need to encompass the process of studying in order to fulfil their professional requirements. According to the National Policy Framework for Teacher Education and Development (1996) a teacher needs to engage in a formal process of training as this will equip them with the knowledge they require to fulfil their task of educating. Likewise, the Government Gazette (2000) which describes the seven roles that a teacher needs to fulfil, one of these roles is for a teacher to be a “...scholar, researcher and lifelong learner...” (p. 13).

Furthermore, in my reflexive journal I commented on the 29 November 2010 that my school has a culture of learning and continuous improvement. I was reflecting on asking my staff their permission and input to conduct my study at the campus. They were all so enthusiastic and excited because the majority of the teaching staff, 86%, has engaged in additional degrees, certificates and courses to improve themselves. Therefore there is a strong culture of studying and enhancing ones skills which is promoted at my school. It is therefore suggested that a teacher needs to have studied in order to be effective in their profession.

4.5.3. Status of teaching profession needs to be promoted

All five of the participants felt that teachers worked extremely hard but were viewed very negatively by the public. Liberator expressed her views in her individual interview when she stated that *“Teachers are not very well paid and you go up and above the call of duty”* (II, p.2). Innovator added that *“Look at what is the public image and what they regard as a profession and I think there was a time when teaching was viewed as a profession but that time has passed”* (II, p.19).

This finding was extended by the focus group interview where the majority of the participants, four out of the five, suggested that there were various reasons for the decline of the teaching profession. Motivator suggested that *“Most of the time when you open up your newspaper you are confronted with negative publicity about teachers”* (FGI, p. 8). Innovator offered some instances of this occurring when she stated that *“You see teachers sexually molesting learners or being fired for still implementing corporal punishment”* (FGI, p.8). Liberator also added that the 2010 strike only compounded this negativity by stating that *“When you opened your paper all you saw was teachers behaving violently, throwing over bins, setting schools alight and intimidating other teachers”* (FGI, p.8).

In addition, the observations that were conducted during the research process revealed the hard work and effort that most of the educators engaged in. Liberator during the staff briefing session raised her hand at the end of the meeting to remind teachers to please remind learners that poetry club is taking place in her class during second break (OS, p. 3). This teacher leader sacrifices most of her free time in engaging learners in extra activities to keep them busy and out of trouble. Innovator has also displayed her commitment to her learners, during a learning area meeting she had offered her peers the opportunity to send their learners to extra Economics lessons which she conducts on Saturdays and holiday sessions (OS, p10). These endeavours of the teacher leaders fall into the argument made by SACE (2000) which states that teachers need to behave and act in a manner that is dignified and brings only positive feedback and reflection to their profession. Therefore, this finding suggests that teachers understand one of their roles as a professional is to promote the status of their profession.

4.5.4. Teachers' skills and knowledge underpin professionalism

This study revealed that all five of the participants felt that a teacher's professionalism is underpinned by their sound knowledge base and their excellent skills and techniques. In the course of conducting the individual interviews this finding was highlighted in various ways. Liberator stated that *"I'm glad that I chose teaching because I feel that I'm good at imparting knowledge and at empowering learners in the classroom"* (II, p.4). When questioned on what drove her into teaching the Persevere stated that *"I wanted to deal with children and impart this love and knowledge onto them"* (II, p.15). This finding ties in with the work done by Hoyle (1982) who suggests that the teaching profession requires an individual who is highly skilled if they wish to be effective educators.

Also, the focus group interview reiterated the finding that teachers' skills and knowledge are pivotal in their profession. Persevere pointed out in this session that *"Professionalism begins with knowing your subject content"* (FGI, p. 5). However, Mediator claimed that *"You have people who know their subject content inside and out but in the same breath they are unable to impart that content, so as a result they are ineffective in the classroom"* (FGI, p. 5). This finding is very similar to the argument made by Hoyle who claims that *"...professionalization has two components, improvement of status and skill..."* (1982, p. 24).

In addition, my self reflexive journal also suggested that an individual's knowledge and skills are important components to their teaching endeavours. On the 18 January 2011 we had a learning area meeting where the topic under discussion was co-ordinators for the different grades and languages. It was evident from the manner in which the meeting unfolded that the educators that were formally placed as language and grade co-ordinators have a thorough knowledge of their subject matter and they had the skills needed to execute their duties. SACE (2006) offers suggestions along similar lines when it states that teachers need to have the capacity to decide what they need to teach and how they are to effectively do this. Therefore, this finding suggests that teachers need to develop a sound knowledge of their content and excellent skills to teach effectively in order to enhance their professionalism.

4.6. Factors promoting teacher leadership and professionalism

In the following section data drawn from this study reveal that in the case study school there were several factors that enhanced or promoted the ideals of teacher leadership and professionalism. These factors were financial incentives, non-financial incentives, time, learners, formal leadership and school culture.

4.6.1. Financial Incentives promotes teacher leadership and professionalism

This study revealed that all five of the participants pointed out those financial incentives will be a key factor that would promote teacher leadership and professionalism. Liberator states that *“Teachers should be offered an incentive financially. There will be financial advantages which will actually better your standard of living.”* (II, p. 3). Motivator also comments on this finding by stating that *“If teachers were given a financial incentive they would obviously go for it that stands to reason. It makes you more eager to receive something at the end of the day”* (II, p. 7). This finding was reinforced by Mediator when she comments financial incentives *“Serve as some sort or form of motivation”* (II, p. 13).

Also, Persevere claims that financial incentives are a way forward because *“I think that it can maybe motivate us as teachers to take on more initiative”* (II, p. 17). Innovator was extremely supportive towards this finding when she suggests that *“I think that is an excellent idea. If we look at the private sector, the private sector is a success because they are driven by incentives”* (II, p. 20). This finding ties in with the work of Fullan (2001) and Holland (2005) who both agree that teachers will feel more motivated to take on initiatives if they were financially rewarded.

Likewise, the survey data also revealed the positive impact financial incentives would make on leadership and professionalism. The majority of participants, 90%, felt that teachers who lead should be remunerated.

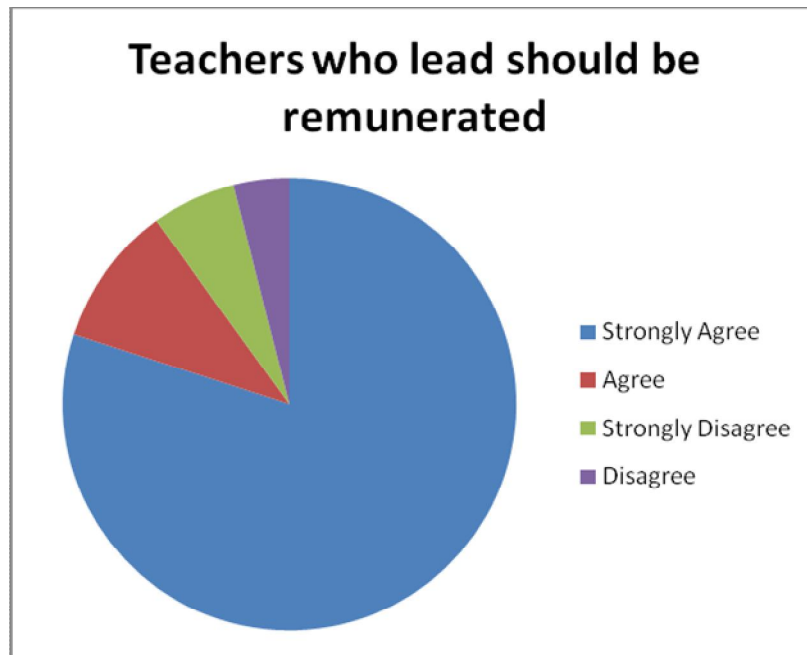


Diagram 3

4.6.2. Non-financial incentives promote teacher leadership and professionalism

This study revealed that 100%, all five participants felt that non-financial incentives, such as encouragement and support, would positively impact on a teachers professional and leadership capacities. Liberator's response in her individual interview offers some clarity to this finding when she suggests that *"I feel that people need to be offered emotional support which will be a morale booster to actually do more and achieve more"* (II, p. 3). Mediator also suggests that *"Boosting a person's confidence in terms of giving them recognition and telling them that was a job well done will boost teachers to take on more responsibility"* (II, p. 13). Innovator adds to this finding by stating that *"I think that teachers need to be recognised, a pat on the back, teacher of the year"* (II, p. 17). This finding coincides with the argument put forth by Gehrke (1988) who states that there needs to be *"...empowerment and encouragement of teachers to become leaders..."* (p. 45).

Also, the finding that non-financial incentives will promote teacher leadership and professionalism is expressed by the participants in their focus group interviews. Liberator discusses her ideas of non-financial incentives by stating that *"You need recognition for an idea, for initiatives even for a programme that you have been driving"* (FGI, p. 7). Motivator adds that *"So in other words receiving that recognition only builds on your character"* (FGI, p. 7). Also, Mediator encourages this finding by stating *"If we develop professionally this will in turn impact on our learners' performance and change education as a whole"* (FGI, p. 8).

This idea is supported by Gehrke who states that we “...need to encourage teachers to develop leadership skills and provide positive and constructive leadership...” (1988, p. 45).

Furthermore, the survey data supported the finding that non-financial incentives will serve to encourage teachers to take on leadership roles and professional initiatives. Most of the participants, 67.1%, strongly agreed and 26.2% agreed, with the fact that all teachers should receive non-financial recognition for leadership. Also, the majority (87.1%) of respondents agreed that teachers need to be supported when taking on leadership roles.

4.6.3. Time is an important factor that promotes teacher leadership and professionalism

This study revealed that three out of the five participants felt that time played a pivotal role in promoting teacher leadership and professionalism. Motivator suggested in her interview to “*Maybe lessen my work load in class to give me more time to perform other tasks*” (II, p. 9). Liberator reinforced this time factor by stating that “*There also has to be time in the classroom to interact with the children*” (II, p. 3). This finding ties in with Gehrke (1988)’s argument that there needs to be time allocated for teacher leaders to complete their work effectively.

Likewise, in my observations conducted it was apparent that teachers need to be allocated more time to conduct their work effectively. The staff development initiative which was observed on the 21 May 2011 reflected teachers developing excellent leadership and professional qualities because there was time allocated for them to do so. The majority of the staff were involved in various initiatives ranging from sports code convenors to fundraising initiators (OS, p. 10). The quadrangular tournament was a huge success because teachers had time allocated to them to perform their tasks effectively. This finding is reinforced by Muijs and Harris (2003) when they claim that “...teacher leadership can be enhanced by creating time to meet and plan and discuss issues...” (p. 443).

4.6.4. Learners play a crucial role in promoting teacher leadership and professionalism

This study revealed that 80%, four of the five teacher leaders, felt that a thorough knowledge of their learners background and learning abilities served as a tool to promote their leadership and professional endeavours. Liberator stated in her individual interview that teachers need to “*Learn more about their learners backgrounds and more about their cultures*” (II, p. 4).

Motivator adds that *“You need a balance with your learner numbers, reduce the number of learners so that learners can receive individual attention”* (II, p. 7). Fidler (2002) suggests that a drastic change in schools is needed to promote the learning opportunities for all.

Also, the focus group interview revealed the idea that teachers need to respect and understand the diversity of their learners if they wish to develop. Liberator suggests that a school needs to become *“A place that encourage effective teaching where one is not judged on their race, gender, sexual orientation, and so forth”* (FGI, p. 5). Mediator argues that if teachers have a clear knowledge of their learners then *“It will give the children courage and motivation to study and apply themselves, which will in turn push our pass rate up”* (FGI, p. 5). This finding is encouraged by several official documents, namely the Government Gazette (2000) which suggests that teachers take on the role of community, citizenship and pastoral.

4.6.5. Formal Leadership promotes teacher leadership and professionalism

All five of the participants stated that the leadership that exists in an institution plays a pivotal role in promoting teacher leadership and professionalism. Persevere stated in her individual interview that *“We also need a lot of support from our principals in all the new ideas we would like to change the school for the better”* (II, p. 14). This idea was extended by Innovator who argues that *“We are also tired of just being told what to do, we would appreciate having discussions as a staff about decisions that affect our lives”* (II, p. 19). This finding coincides with the work conducted by Blackmore (2006), Fullan (2009) and Hargreaves (1992) who all agree that the leadership of a school plays a significant role in promoting and encouraging teachers to take on new initiatives

Likewise, in my self reflexive journal I commented that the management team played a significant role in promoting leadership and professionalism in the school. I commented on the 18 January 2011 when reflecting on a learning area meeting that took place that I thoroughly enjoyed working with the language head of department because he considered the needs and goals of his teachers before he voiced what he hoped to achieve. This finding ties in with the work of Blackmore (2006) who suggests that *“...leaders would require excellent communication skills and a capacity to delegate...”* (p. 187).

4.6.6. School culture promotes teacher leadership and professionalism

The majority of the five teacher leaders, four of them, described the culture of a school being an integral part in leadership and professionalism. Liberator comments that schools need to have “*An atmosphere of tolerance, of cooperation, an atmosphere of healthy learning needs to be created amongst educators and learners alike*” (II, p. 4). Also, Persevere suggests that “*Cultures among teachers that is very encouraging and open to ideas and new initiatives*” (II, p. 15). Harris and Lambert argue along similar lines when they state that schools need “...a culture that promotes collegiality, trust, collaborative working relationships and focuses on teaching and learning...” (2007, p. 15).

In addition, the observations conducted in this study suggested that a school culture promotes teacher leadership and professionalism. The staff briefing that was observed on 14 March 2011 reflected a school culture that encourages teachers to work together towards a common goal. The topic under discussion was the feeding scheme because our principal was informing the staff that the private sponsor has pulled out and this posed a serious problem because the department does not finance feeding schemes in the high schools. Most of the teachers offered support in terms of private donations, fund raising suggestions and approaching different businesses. By the end of the briefing the feeding scheme was up and running again. This finding coincides with the argument made by Hargreaves (1992) who states that “...collegiality among teachers and between teachers and their principals has been advanced as one of the most fruitful strategies for fostering development...” (p. 80).

4.7. Factors inhibiting teacher leadership and professionalism

In the following section data drawn from this study reveal that in the case study school there were several factors that inhibited the ideals of teacher professionalism and leadership from becoming a reality. These factors included financial obligations, formal leadership, sacrifices, teachers’ dispositions, relationships, unions and learners.

4.7.1. Financial Obligations inhibit teacher leadership and professionalism

This study revealed that four out of the five teacher leaders felt that teachers work extremely hard but they are not fully remunerated for their endeavours. Liberator states in her interview regarding the 2010 strike period that “*I was torn between going out and fighting for a living wage, we were morally obligated to be in the classroom but we also need to earn a living wage for our own families*” (II, p.4). Persevere felt very similar to Liberator when she states

that *“We went out on strike thinking that we were going to get better salaries, we are still crying with our salaries and they are still docking us”* (II, p. 19). Fullan (2001) suggests that in order to build up the morale of the teaching profession some form of incentive is needed. This argument ties in with the participants view as they feel that they are going over and above the call of duty but they receive nothing in return, this serves as a form of demotivation for teachers to encompass more leadership and professional roles.

The focus group interviews also revealed the feelings that the teacher leaders felt overworked and underpaid. Motivator states that *“We work so hard, over weekends, most of our evenings and we do not get anything out of it”* (FGI, p. 4). This finding was also expressed by Liberator who claims that *“Most of my spare time goes towards my school work, even when I am meant to be relaxing with a book I find myself thinking of ways to be more creative in the classroom”* (FGI, p.4).

4.7.2. Formal Leadership inhibit teacher leadership and professionalism

All of the five teacher leaders involved in the study felt that the principal of the school was a major barrier to their development. Liberator states that *“New initiatives are never introduced unless it finds the principals favour. If it is not going to benefit him personally then that new initiative is not introduced and some of the time these new initiatives are sometimes beneficial to the learners”* (FGI, p. 5). Innovator adds to this finding by suggesting that *“It was originally your idea, then he takes over it and tells us we no longer want to achieve this now, using your idea, so you loose ownership of your idea”* (FGI, p. 5). Persevere also comments that *“This intimidation extends further, there is a good initiative you actually do not want to raise your hand in the staffroom and actually voice it, what that initiative is because you are afraid not only of intimidation but he is also very sarcastic towards you”* (FGI, p. 5). This finding ties in with the work conducted by Gehrke (1988) who states that the *“...main barrier to teacher leadership concerns the top down leadership model that still exists and dominates in many schools...”* (p. 44).

The survey data also suggested that leadership was a barrier to teacher leadership and professionalism. When asked if the majority of the staff is involved in major decision making at the school, the majority (87%) indicated that they were not involved in any major decision making processes at the school. Also most of the teachers, 76.3%, indicated that they were not encouraged to take on any new initiatives.

4.7.3. Sacrifices inhibit teacher leadership and professionalism

Most, three of the five teacher leader indicated that the sacrifices of their family and time was a barrier to them taking on additional responsibilities. Innovator suggests in her individual interview that *“Being out late for meetings, you have to organise your own transport, it is not fair on us or our families”* (II, p. 3). These sentiments were shared by Mediator who claims that *“Marking late at night and preparing exciting lessons rob my children of time spent with me”* (II, p. 13). Collay (2006) argues along similar lines when she suggest that all these new calls for innovation are coming at a time when teachers are feeling overwhelmed.

4.7.4. Teachers’ feelings inhibit teacher leadership and professionalism

All five of the participants indicated in the focus group interview that they were feeling unappreciated for the amount of work and effort they put in. Liberator stated that *“I feel so drained and tired at the end of each term because of the volume of work that we are expected to turn out”* (FGI, p. 5). Motivator also added that *“We sacrifice so much to ensure that our children receive the best possible education that we neglect our own well being”* (FGI, p. 5). This finding ties in with the work of Fullan (2001) who claims that the intense pressure on teachers only does damage than good.

4.7.5. Relationships inhibit teacher leadership and professionalism

Three of the five participants indicated that some of the relationships that they share with peers intimidates them and serves as a barrier to their development. Innovator claims that *“You often have a good idea but you are scared to voice it because people will feel you are sucking up”* (II, p. 12). These feelings are shred by Liberator who claims that *“Most of the time you have a excellent suggestion but the staff does not accept it because it came from you”* (II, p. 3). Muijs and Harris (2003) argue along similar lines when they state that *“...teachers taking on leadership roles can be ostracised by their colleagues...”* (p. 442).

4.7.6. Unions inhibit teacher leadership and professionalism

All five of the teacher leaders felt that their union served as a barrier to their development. They all commented that their union does nothing to develop them professionally. Persevere stated in the focus group interview that *“The only time I remember that I am in a union is when it comes to wage negotiations”* (FGI, p.4). Mediator also suggested that *“We are often told about bursaries that are available to further our studies but we never receive them and*

we are also never told who they go to” (FGI, p. 4). This finding ties in with the work of Vongalis-Macrow (1996) who argue that unions of the past are only associated with strikes and for blocking reforms.

4.8. Conclusion

This chapter focused on the major findings that emerged from the case study research. It became evident that teachers involved in the study felt that teacher leadership was present in their school and existed within the classroom, throughout the school, between educators and their colleagues and in society as a whole. This study also revealed that teachers viewed teaching as a profession that is underpinned by key characteristics such as qualifications, skills and determination. Furthermore, this study highlighted several factors that promoted teacher leadership and professionalism such as incentives, support and collaboration. This study also suggested that various factors inhibited teacher leadership and professionalism such as formal leadership, unions and sacrifices.

In the following chapter I will pen some conclusions and suggest possible topics for future research.

CHAPTER FIVE: CONCLUSION

5.1. Introduction to the chapter

This chapter summarises the main finding of my research project. I begin with a discourse of the teachers' views of teacher leadership and the enactment of this phenomenon by the five teacher leaders. This is followed by a discourse of the perceptions and enactment of teacher professionalism. This chapter then focuses on several factors that promote teacher leadership and teacher professionalism. A discussion on factors that inhibit teacher leadership and teacher professionalism then follows. Thereafter, I offer several recommendations for further research and then discuss some reflections on the research process. This chapter then concludes by offering the important contribution this research has made.

My study aimed to examine how teachers could lead schools better to ensure that they are professional places of teaching and learning. The purpose of this case study was to examine how the ideals of teacher leadership and teacher professionalism contributed to achieving the goal of effective teaching and learning. This case study research was inspired by several key factors. At first, the current situation that South African education is in depicts a reality of demise and conflict. Teachers are being viewed as selfish individuals who are not concerned with the learners placed under their care. In addition, teachers are feeling overwhelmed by the various changes that are occurring in education and the huge demands placed on them. Also, there are gaps that exist in literature which are expressed by Collay (2006), Harris (2004) and Spillane (2004), among other prolific writers, who suggest that teacher leadership and professionalism are excellent ideals to encompass but there is limited evidence to support this claim. It was for these reasons that I engaged in this study, to promote the concepts of professionalism and leadership as this study revealed that these roles are exactly what teachers need to uplift themselves and education as a whole.

5.2. Summary of findings

5.2.1. Teacher Leadership

All five of my teacher leaders involved in the case study research all indicated that teacher leadership was occurring in their schools in four different spheres, which were in their individual classrooms, the collaborative relationships they share, within the school and within the learning community as a whole. This finding ties in with the model designed by Grant (2006) where she describes teacher leadership occurring in four zones: in the classroom,

working with other educators and students outside the classroom in curricular and extra curricular activities, outside the classroom in whole school development, and between neighbouring schools in the community.

In addition, four of the five participants stated that you have to be a leader within your classroom. This finding was articulated in Mediator's individual interview when she states that "*You are leading within your class and those children are then compelled to follow a leader because if you are not a leader within your classroom they are going to walk all over you*" (II, p. 10). This finding is also reinforced by the observations carried out where Liberator took the initiative to teach all the grade twelve learners a prescribed poem because of her excellent knowledge and creativity the learners were able to understand (OS, p. 14). This key finding ties in with the work of Rogus (1988) who argues that teacher leaders have to be leaders within their classrooms. Therefore, this finding suggests that teachers are to be leaders within their classrooms to improve the conditions faced in schools.

Also, 100% of the teacher leaders (all five) suggested that working well with others was a key characteristic of their professional success. This finding was highlighted in the focus group interview when Mediator stated that "*There is a collaborative culture that exists at my school*" (FGI, p. 4). This finding was also highlighted in an observation session where all the grade nine class teachers worked together to come up with possible solutions to deal effectively with problem learners (OS, p. 3). Gehrke (1988) argues along similar lines when he states that a key characteristic of teacher leadership is teachers working collectively to develop expertise they require to be effective. It is therefore suggested that teachers need to have a good working relationship with others in order to lead schools better.

Furthermore, this study revealed that teacher leadership was also practiced within the context, four out of the five teacher leaders indicated that teacher leadership exists at their campus. Motivator reinforced this finding in her individual interview where she states that "*Certain aspects of what is taking place in the school I am able to give input and also come up with suggestions that other colleagues or educators put into practice and find that they actually work*" (II, p. 7). Also, the survey completed by the staff of the case study school revealed that when posed the question if the majority of teachers take up leadership roles, the majority of the staff agreed, 25.6% agreed and 39.5% strongly agreed. This finding coincides with the work of Lieberman and Miller (2004) who suggest that "...teachers performed their

leadership in the context of their school...” (p. 17). Therefore, this finding offers us the suggestion that teacher leadership needs to be a whole school phenomenon in order to improve the learning opportunities for all.

Also, two of the five teacher leaders indicated that teacher leadership takes place in their communities. This finding was articulated by Persevere who stated in her interview that “*I am a leader in the community. When you are a teacher everybody thinks that you are the main person, they come to you for advice and if they need something to be written they also come to you*” (II, p. 11). This finding coincides with the argument put forth by Grant (2008) who claims that teacher leadership must not be confined by the boundaries of the school but needs to be fostered within the community and surrounding schools. This finding also points out that teachers need to be leaders in their surrounding learning community to ensure that schools become professional places of teaching and learning.

However, this study also revealed that 40% (two of the five) of the participants felt that they were involved in only superficial leadership tasks. Innovator discusses this finding in her individual interview when she states that “*I think the majority of staff where I teach we are engaged in superficial leadership tasks*” (II, p. 10). Grant (2008) argues along similar lines when she claims that some teachers feel that they are not involved in the overall vision of the school. This finding indicates the need to include teachers in worthwhile leadership activities as they are the individual who are needed to promote quality education.

5.2.2. Teacher professionalism

This study revealed that four of the five teacher leaders felt that teaching was definitely a profession. Innovator shares her perception of teaching by stating that “*I think teaching is a profession because you cannot take anybody from the street and ask them to go and teach*” (II, p. 18). Also, the survey that was conducted in the case study school showed that an overwhelming majority, 95% strongly agreed and 2% agreed; felt that teaching is a profession. This finding ties in with the work of Sachs (1999) who argues that teaching is definitely a profession because it plays a crucial role in the way society functions. Therefore, this finding suggests that teachers view their career as a profession.

In addition, two of the five participants felt that you need to study or have formal training in order to carry out your professional requirements effectively. Liberator voiced her opinion

when she stated that *“We have to study to become teachers”* (II, p. 1). In the process of document analysis it was also revealed that according to the National Policy Framework for Teacher Education and Development (1996) a teacher needs to engage in a formal process of training as this will equip them with the knowledge and skills they require to fulfil their task of educating. This finding coincides with the work carried out by Hoyle (1982) who states that *“...the period of education and training also involves the process of socialisation into professional values...”* (p. 20). As a result this finding suggests that professionalism is understood by teachers as involving a process of studying and training.

Also, all five of the participants felt that teachers were viewed negatively by the public. Innovator comments on this finding when she states *“Look at what is the public image and what they regard as a profession and I think there was a time when teaching was viewed as a profession but that time has passed”* (II, p. 19). Liberator also added that the 2010 strike only compounded this negatively by stating that *“When you opened your paper all you saw was teachers behaving violently, throwing over bins, setting schools alight and intimidating other teachers”* (FGI, p. 8). This finding is similar to the work done by SACE (2000) which states that teachers need to behave and act in a manner that is dignified and brings only positive feedback and reflection to their profession. Therefore, this finding suggests that teachers felt that a professional individual will not bring disrepute to their profession.

Furthermore, this study revealed that all five of the teacher leaders felt that a teacher’s professionalism is underpinned by their sound knowledge base and their excellent skills and techniques. Persevere pointed out in the focus group interview that *“Professionalism begins with knowing your subject content”* (FGI, p. 5). However, Mediator claimed that *“You have people who know their subject content inside and out but in the same breath they are unable to impart that content, so as a result they are ineffective in the classroom”* (FGI, p. 5). This finding ties in with the work done by Hoyle (1982) who suggests that the teaching profession requires individuals who are highly skilled and knowledgeable if they wish to be effective educators. Therefore, this finding suggests that teachers understand professionalism to be characterised by highly skilled and knowledgeable individuals.

5.2.3. Factors promoting teacher leadership and teacher professionalism

This study revealed that in the case study school there were several factors that enhanced teacher leadership and teacher professionalism, namely: financial incentives, non-financial incentives, time and school culture. All five of the teacher leaders pointed out that financial incentive will be a key factor that would promote teacher leadership and professionalism. Motivator articulates this finding when she states that *“If teachers were given a financial incentive they would obviously go for it that stands to reason. It makes you more eager to receive something at the end of the day”* (II, p. 7). The survey data also reinforced this finding with 90% of the respondents stating that they felt teachers who lead should be remunerated. Fullan (2001) and Holland (2005) both argue along similar lines when they claim that teachers will feel more motivated to take on initiatives if they were financially rewarded. This finding therefore suggests that financial incentives serve as a factor that promotes teacher leadership and professionalism.

In addition, all five participants felt that non-financial incentives such as encouragement and support would encourage teachers to develop their leadership and professional skills. Liberator’s response in her individual interview offers some clarity to this finding when she suggests that *“I feel that people need to be offered emotional support which will be a morale booster to actually do more and achieve more”* (II, p. 3). The survey data reinforced this finding with 67.1% strongly agreeing and 26.2% agreeing with the question of should all teachers receive non-financial recognition for leadership. Gehrke (1988) argues along similar lines when he states that there needs to be *“...empowerment and encouragement of teaches to become leaders...”* (p.45). This finding therefore suggests that non-financial incentives would serve as a factor to promote teacher leadership and professionalism.

Also, this study revealed that three out of the five participants felt that time played a pivotal role in promoting teacher leadership and professionalism. Motivator suggested in her interview to *“Maybe lessen my work load in class to give me more time to perform other tasks”* (II, p. 9). Liberator reinforced this time factor by stating that *“There also has to be time in the classroom to interact with the children”* (II, p. 3). This finding is reinforced by Muijs and Harris (2003) when they claim that *“...teacher leadership can be enhanced by creating time to meet and plan and discuss issues...”* (p.443). Therefore this finding suggests that teachers viewed time as a factor that promoted teacher professionalism and leadership.

In addition, the majority of the teacher leaders (four of five) described the culture of a school being an integral part in leadership and professionalism. Liberator comments that schools need to have “*An atmosphere of tolerance, of cooperation, an atmosphere of healthy learning needs to be created amongst educators and learners alike*” (II, p. 4). Also, Persevere suggests that “*Cultures among teachers that is very encouraging and open to new initiatives*” (II, p. 13). Harris and Lambert argue along similar lines when they state that schools need “...a culture that promotes collegiality, trust, collaborative working relationships and focuses on teaching and learning...” (2007, p. 15). This finding therefore hints at the fact that school culture is a factor that promotes teacher leadership and professionalism.

5.2.4. Factors inhibiting teacher leadership and teacher professionalism

This study revealed that in the case study school there were several factors that inhibited the ideals of teacher professionalism and leadership from becoming a reality. These factors included formal leadership, relationships and unions. All five of the teacher leaders involved in the study indicated that the principal of the school was a major barrier to their development. Liberator states that “*New initiatives are never introduced unless it finds the principals favour. If it is not going to benefit him personally then that new initiative is not introduced and some of the time the new initiatives are sometimes beneficial to the learners*” (FGI, p. 5). The survey data reinforced this finding by reflecting 87% of the respondents indicated that they were not involved in any major decision making processes at the school. This finding tie in with the work conducted by Gehrke (1988) who states that the “...main barrier to teacher leadership concerns the top down leadership model that still exists and dominates in many schools...” (p. 44). Therefore, this finding hints at the possibility of principals being a barrier to teacher leadership and teacher professionalism.

In addition, three of the five teacher leaders indicated that some of the relationships that they share with their colleagues intimidates them and serves as a barrier to their development. Innovator clams that “*You often have a good idea but you are scared to voice it because people feel that you are sucking up*” (II, p.12). The survey data reinforces this finding by indicating that most teachers, 76.3%, felt that they were not encouraged to take on any new initiatives. Muijs and Harris (2003) argue along similar lines when they state that “...teachers taking on leadership roles can be ostracised by their colleagues...” (p. 442). This finding suggests that peer relationships could serve as a barrier to teacher leadership and teacher professionalism.

Furthermore, all five of the participants felt that their union served as a barrier to their development. They all commented that their union, both NAPTOSA and SADTU, does absolutely nothing to develop them professionally. Persevere added in the focus group interview that *“The only time I remember that I am in a union is when it comes to wage negotiations”* (FGI, p. 4). This finding ties in with the work of Vongalis-Macrow (1996) who argues that unions of the past were only associated with strikes and reform blockages. Therefore, this finding suggests that unions serve as a barrier to teacher leadership and teacher professionalism.

5.3. Recommendations for further research

My engagement with this study has afforded me an opportunity to identify a number of gaps regarding the issues of teacher leadership and teacher professionalism research. These gaps can be addressed through the following suggestions which need to be part of future research:

- This study revealed that teacher leadership was a reality in the case study school; however, some teachers felt that they were only involved in superficial leadership tasks. More research needs to be conducted to identify possible measures that can be introduced in schools to ensure that teachers are taking on meaningful and worthwhile teacher leadership tasks.
- Also, this study revealed that teachers viewed teaching as a profession. However, the concept of teacher professionalism is limited and further research is needed to identify what key characteristics constitute professionalism. I have formulated a model which was inspired by Grant (2008) that could perhaps help in this research.

CONTEXT: EFFECTIVE EDUCATIONAL TRANSFORMATION

Requirements for teacher professionalism

4 Zones:

1. In the classroom
2. In the school
3. In the learning community
4. In society as a whole

7 Roles:

1. Punctual
 2. Appropriate dress code
 3. Effective instruction
 4. Collaboration with peers, learners and parents
 5. Uplifting profession
 6. Role model
 7. Leadership activities
- Furthermore, the study revealed that several factors promoted teacher leadership and professionalism, namely: financial incentives, non-financial incentives, time, learners, formal leadership and school culture. Perhaps a more quantitative study on these factors would make this finding more plausible.
 - In addition, this study revealed several barriers to teacher professionalism and leadership, namely: financial obligations, formal leadership, sacrifices, teachers' dispositions, relationships and unions. Research is needed to identify possible ways of dealing with these barriers.

5.4. Reflections on the research process

My research was part of a broader team of eight other student researchers. Most of the principles and theories on teacher leadership and professionalism were applicable to this group. We met at regular intervals and worked together, a key characteristic of leadership and professionalism, to design our research model and tools that we required collecting our data. I thoroughly enjoyed the experience of working with such dynamic and creative people, as it kept me focused and motivated to reach my vision.

However, each of the eight group members was required to conduct their research individually in their case study schools. It was with much trepidation and anxiety that I approached this research process, as I was a novice researcher in terms of conducting interviews, observations and document analysis. However, I now feel like an empowered researcher who has contributed positively to education as a whole.

5.5. Conclusion of the chapter

As a teacher at a secondary urban school in Pietermaritzburg I am constantly faced with the challenges and changes that exist in education. My hope and desire is for every single learner to receive quality education, which will empower them to face the reality of life after school. It was for this reason that I embarked on my research to discover how teachers could lead schools better to ensure that they were professional places of teaching and learning. I am confident that my research would make a positive difference in the lives of all educators as it reflected that teacher leadership and teacher professionalism improve conditions in schools. However, it also highlights that there are barriers that exist in schools that need to be addressed urgently to ensure that leadership and professionalism become a reality for all teachers.

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Appendices

APPENDIX 1: 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.

TEACHER QUESTIONNAIRE

Please place a CROSS(X) in the appropriate box for each of the items below.

A: Biographical Information

1 Gender:

Male	Female	
------	--------	--

2 Race:

African	Coloured	Indian	White	
---------	----------	--------	-------	--

3 Age:

Below 20	21-30	31-40	41-50	51 +	
----------	-------	-------	-------	------	--

4 Your formal qualification:

M3 and below	M3-M4	M5 and above	
--------------	-------	--------------	--

5 Nature of employment:

Permanent	Temporary	SGB	
-----------	-----------	-----	--

6 Years of teaching experience:

0-5 years	6-10 years	11-15 years	16 years +	
-----------	------------	-------------	------------	--

7 Member of a union:

Yes	No	
-----	----	--

8 If yes, which union do you belong to:

SADTU	NAPTOSA	NATU	SAOU	
-------	---------	------	------	--

B: School Information:

9 Learner enrolment:

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

10 School type:

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

11 Funding status:

Section 20	Section 21	Private	
------------	------------	---------	--

12 Annual School Fees:

R0	R1-R499	R500-R999	R1000-R1499	R1500+
----	---------	-----------	-------------	--------

13 Number of teachers, including management, in your school:

1-9	10-19	20-29	30-39	40+
-----	-------	-------	-------	-----

C: Teacher Leadership and Professionalism Survey

Instructions: Place a CROSS (X) in the column that most closely describes your opinion on the role of leadership in your school.

Scale: 4=strongly agree, 3=agree, 2=disagree, 1=strongly disagree

	I believe:	4	3	2	1
14	That teaching is a profession.				
15	All teachers should take on a leadership role in their school.				
16	All teachers should be able to bring about change.				
17	My school promotes discussions on HIV and AIDS.				
18	That teachers are professional if they work well with others (collegial).				
19	That teachers are professional if they are punctual.				
20	That teachers are professional if they promote the image of the profession.				
21	The majority of teachers in my school take up leadership roles.				
22	That only people in formal positions of authority should lead.				
23	That teachers are professional if they are loyal to their school.				
24	That teachers are professional if they respect the dignity and beliefs of learners.				
26	That unions develop teachers professionally.				
27	That teachers are professional if they refrain from any form of improper contact with learners.				
28	That teachers are professional if they refrain from undermining the status and authority of their colleagues.				
29	The majority of teachers in my school are part of the important decision-making processes.				
30	Teachers are encouraged to take initiative in my school.				
31	That teachers are professional if they respect the choices of their colleagues.				
32	That teachers are professional if they promote the ongoing development of the teaching profession.				
33	That unions develop leadership in teachers.				
34	My school has a professional ethos.				
35	That teachers are professional if they refrain from discussing confidential matters with unauthorised persons.				

APPENDIX TWO

OBSERVATION SCHEDULE

Purpose and Focus of the Observation:

We wish to learn more about teacher leadership and its link to professionalism and unionisation as it is experienced in our schools by recording our observations in the template provided and by reflecting how this phenomenon is “ ... socially constructed in terms of power , communication lines , discourse and language” (Nieuvenhuis, 2007, p. 84).

Guiding questions:

Core Question: How can teachers lead schools better to ensure that they are professional places of teaching and learning?

Subsidiary Questions:

1. How is professionalism understood by teachers?
2. What factors promote or inhibit teacher leadership and teacher professionalism in schools?

Situations to be observed during the 8 week observation cycle:

1. staff briefing every two weeks (4 briefing observations in the 8 week cycle)
2. A trans- sect (walk around the school)
3. 1 staff meeting (minimum)
4. 1 staff development session
5. Grade/phase/learning area/subject meeting (minimum of 2)

Key focus points to bear in mind during observation process:

1. We are aiming to see if teachers are engaged in any forms of teacher leadership either formally and informally. Grant's (2008) teacher leadership model (Appendix Five) will be used to assist in this regard.
2. We wish to observe how teachers carry themselves as professionals in their interactions with their colleagues (levels of collegiality amongst post level one teachers and in relation to SMT members). Criteria, developed from the SACE policy and code of ethics documents, will be developed to assist in this observation process.
3. We wish to observe how teachers conduct themselves in relation to their learners.
4. Is the teacher's leadership derived from the formal position they hold or from other factors (such as age, experience, expertise, skills. etc.)?
5. Is the leadership of teachers in the school contributing to a socially just environment (are they fair, inclusive, empowering and transformative)?
6. Are teacher leaders taking up their agency role? (willingness to innovate and change)
7. Observe the teacher's role as union members.
8. Observe how union membership and influence impacts on teachers and their leadership in the school. Can teachers engage in dialogue about union matters and actively apply this to their ability to lead? How does this engagement impact on the school?

APPENDIX THREE

INDIVIDUAL INTERVIEW SCHEDULE

1. Do you think teaching is a profession? Explain.
 2. Why did you choose teaching as a career?
 3. Do you consider yourself a teacher leader? Why do you hold this view? Please talk about some of the leadership opportunities you have had/have not had. [follow up] Were these leadership roles self-initiated or SMT initiated?
 4. What is your personal view on teachers being offered incentives (financial or other) to enact leadership in schools? [follow up] Advantages/disadvantages?
 5. How does your union help you to develop professionally?
 5. Are there situations where you experience a clash between your professional and your union identities? Talk a little about this. How do you balance the possible tensions that may arise?
 7. How can you use your power as a professional to transform your school into a socially just space for teaching and learning?
-

APPENDIX FOUR

FOCUS GROUP INTERVIEW SCHEDULE

1. What do you understand 'professionalism' to mean?
 2. Would you consider your school to be a professional place of teaching and learning? Why do you say so?
 3. Does the culture of your school encourage teachers to introduce and lead new initiatives? Explain.
 4. Should teachers at your school be rewarded for taking on leadership roles? Why? /Why not? If so, in what forms?
 5. Do you believe that the teacher unions provide adequate information and support to help teachers develop professionally?
 6. How did the teacher strike action towards the end of 2010 affect your school? In your response, please share some of the tensions that you as a staff experienced as a consequence of the various union affiliations and how this impacted on the various notions of professionalism.
 7. How can you, as members of the teaching staff, use your power as professionals to transform your school into a more socially just place of teaching and learning?
-

APPENDIX FIVE: UNIVERSITY OF KWAZULU-NATAL

ETHICAL CLEARANCE APPLICATION FORM

September 2010

(HUMAN AND SOCIAL SCIENCES)

PLEASE NOTE THAT THE FORM MUST BE COMPLETED IN TYPED SCRIPT. HANDWRITTEN APPLICATIONS WILL NOT BE CONSIDERED

SECTION 1: PERSONAL DETAILS

- 1.1 **Full Name & Surname of Applicant** : Carolyn (Callie) Grant
- 1.2 Title (Ms/ Mr/ Mrs/ Dr/ Professor etc) : Dr
- 1.3 Applicants gender : Female
- 1.4 Applicants Race (African/
Coloured/Indian/White/Other) : White
- 1.3 Student Number (where applicable) : N/A
- Staff Number (where applicable) : 24502
- 1.4 School : School of Education and Development
- 1.5 Faculty : Education
- 1.6 Campus : Pietermaritzburg
- 1.7 Existing Qualifications : HDE (Edgewood College) BA (UNISA) BED (UND) MED
(UNP)
- PhD (UKZN)

1.8 Proposed Qualification for Project : Specialisation research project involving staff, B. Ed Honours as well

(In the case of research of degree purposes) as Masters Education Leadership, Management and Policy (ELMP)

students

2. Contact Details

Tel. No. : 033-2606185

Cell. No. : 0844003347

e-mail : grantc@ukzn.ac.za

Postal address (in the case of students

and external applicants) : Room 42^a School of Education and Development, PMB campus, UKZN

3. SUPERVISOR/ PROJECT LEADER DETAILS

NAME	TELEPHONE NO.	EMAIL	DEPARTMENT / INSTITUTION	QUALIFICATIONS
3.1 Callie Grant (Project leader)	033-2606185	grantc@ukzn.ac.za	Education, UKZN	PhD
3.2 Irene Muzvidziwa	033-2606095	muzvidziwai@ukzn.ac.za	Education, UKZN	PhD
3.3 Neil Avery	033-2605291	averyn@ukzn.ac.za	Education, UKZN	M Ed
3.4 Pete Jugmohan	033-2606046	jugmohanp@ukzn.ac.za	Education, UKZN	M A

SECTION 2: PROJECT DESCRIPTION

Please do *not* provide your full research proposal here: what is required is a short project description of not more than two pages that gives, under the following headings, a brief overview spelling out the background to the study, the key questions to be addressed, the participants (or subjects) and research site, including a full description of the sample, and the research approach/ methods

Preamble

I am applying for ethical clearance to lead an ELMP group research project in the Faculty of Education, UKZN. The project aims to explore issues of professionalism and professional development as they relate to the leadership of teachers¹. The project is contextualised against the backdrop of the recent strike action in the schooling sector in 2010. The group project could potentially involve four sub-groups of ELMP students on the Pietermaritzburg campus:

- the 2011 ELMP Independent Research students
- the Master of Education course work ELMP students in their second year of study in 2011
- the new full thesis Master of Education students that we accept in 2011
- PhD students who are interested in this area of study

The project will begin in January 2011 and it is envisaged that it could continue for a three year period.

2.1 Project title

Leaders as professionals: what does this mean for teachers?

2.2 Location of the study (where will the study be conducted)

¹ Here I use the term teacher to include post level one teachers as well as teachers who are members of the School Management Team

The study will have a range of sites as determined by the students registered for the qualifications as listed in the preamble. It is envisaged that:

- the 2011 ELMP Independent Research group will explore the research questions in relation to teachers at their own schools or at a school of their choice (to be determined in 2011).
- the Master of Education ELMP course work group (2010 – 2011) will carry out their research in their own schools which include, but are not limited to:
 - o Forest Hills Primary
 - o Ridge Junior Primary
 - o Haythorne Secondary
 - o Eastwood Secondary
 - o Berg Street Primary
 - o Dowdle Primary
 - o Ramatha Road Primary
 - o Regina Primary
 - o Langsyde School

- the new intake of full thesis Master of Education (ELMP) students as well as the new PhD students will be invited to join this project and will be urged to contextualise their research within the ACE – SL programme at UKZN. It is envisaged, therefore, that they will conduct their research in a sample of schools of students who are either registered for the ACE – SL or who have recently completed the ACE – SL. Should none of these students be interested in this project, this aspect will be taken up by the ELMP lecturers themselves.

2.3 Objectives of and need for the study

(Set out the major objectives and the theoretical approach of the research, indicating briefly, why you believe the study is needed.)

The area of teacher leadership within a distributed leadership framing has been an ongoing area of research interest in the Education leadership, management and policy specialisation on the Pietermaritzburg campus over the last five years (see for example Grant, 2006; Singh, 2007; Khumalo, 2008; Pillay, 2009; Nene, 2010).

Building on this research, and against the backdrop of the recent teacher strikes, this study seeks to explore the leadership of teachers but particularly in relation to issues of professionalism and to their professional development role (Zimpher, 1988; Katzenmeyer and Moller, 2001). We are therefore interested to find out what professional development experiences, both formal and informal, teacher leaders are involved in and how these professional development experiences are enabled or constrained by their union association.

2.4 Questions to be answered in the research

(Set out the critical questions which you intend to answer by undertaking this research.)

Core question:

How can teachers lead schools better to ensure that they are professional places of teaching and learning?

Subsidiary Questions

1. How is professionalism understood by teachers and how does this professionalism contribute to transforming schools into socially just spaces of teaching and learning?
2. Do teachers readily embrace their change agent role and what incentives are used in schools to encourage teachers to operate as leaders and professionals?
3. How do teacher unions enhance or inhibit the development of teacher leadership and professionalism in schools?

2.5 Research approach/ methods

(This section should explain how you will go about answering the critical questions which you have identified under

2.4 above. Set out the approach within which you will work, and indicate in step-by-step point form the methods you

will use in this research in order to answer the critical questions).

The project is conceptualised within the interpretive paradigm and will adopt a range of approaches and methods, determined by the research questions in the first instance and, in the second instance, by the nature of

the student group embarking on the research and the requirements of the qualification for which they are registered (listed in the preamble). These approaches and methods may include:

In the case of the Honours Independent Research 2011 project

- a survey, using questionnaires, (*Appendix One*) of a range of school teachers in a variety of KZN schools (the choice of school will be determined by the IR students themselves when they register for the module in 2011)

In the case of the Master of Education ELMP course work group (2010 – 2011)

- a multi-case study in the nine schools listed in Section 2.2 above. Duration of data collection process: 1st term of 2011. Methods to collect data will include, possibly in the following sequence:
 - a questionnaire to all teachers in the school (*Appendix One*)
 - observation of a staff briefing session using an observation schedule (*Appendix Two*)
 - in-depth individual interviews with each of the primary participants (*Appendix Three*)
 - observation of grade/phase/learning area/subject meeting (*Appendix Two*)
 - sourcing and analysing of documents, for example
 - school minutes
 - school policies on professional development
 - provincial leadership training materials
 - provincial professional development circulars
 - national Task Team Report on Education Management Development (1996)
 - South African Council of Educators policies and documents
 - Union professional development policies
 - Union leadership development policies
 - observation of a second staff briefing session (*Appendix Two*)
 - observation of a staff meeting (*Appendix Two*)
 - trans-sect walk around the school (*Appendix Two*)
 - observation of a staff development session (*Appendix Two*)
 - observation of second grade/phase/learning area/subject meeting (*Appendix Two*)
 - focus group interview(s) with primary participants (*Appendix Four*)

In the case of the new intake of M. Ed full thesis students and PhD students in 2011, the project will be contextualised within the ACE – SL programme at UKZN

- a broad survey, using questionnaires, (*Appendix One*) of the school leaders registered for (and/or who have completed) the ACE –SL
- in-depth case studies of a range of schools, selected because they are the schools which are led and managed by school leaders who are either registered for or who have completed the ACE –SL. Methods to collect data will include a teacher questionnaire (*Appendix One*), individual (*Appendix Three*) and focus group interviews (*Appendix Four*), observation (*Appendix Two*) as well as document analysis (as listed directly above).

For a study that involves surveys, please append a provisional copy of the questionnaire to be used. The questionnaire should show how informed consent is to be achieved as well as indicate to respondents that they may withdraw their participation at any time, should they so wish.

2.6 Proposed work plan

Set out your intended plan of work for the research, indicating important target dates necessary to meet your proposed deadline.

STEPS	DATES
Develop research proposal	October 2010
Ethical Clearance application	November 2010
Pilot instruments	November 2010
Collect data	February – June 2011
Data analysis	May – September 2011
Write up research reports / dissertations	October – November 2011
Submit research reports / dissertations	December 2011

This process may continue into 2012 and 2013 as the Med full thesis and PhD students start to collect their data and begin to write up their chapters.

SECTION 3: ETHICAL ISSUES

The UKZN Research Ethics Policy applies to all members of staff, graduate and undergraduate students who are involved in research on or off the campuses of University of KwaZulu-Natal. In addition, any person not affiliated with UKZN who wishes to conduct research with UKZN students and / or staff is bound by the same ethics framework. Each member of the University community is responsible for implementing this Policy in relation to scholarly work with which she or he is associated and to avoid any activity which might be considered to be in violation of this Policy.

All students and members of staff must familiarize themselves with AND sign an undertaking to comply with the University's "Code of Conduct for Research".

QUESTION 3.1

Does your study cover research involving:	YES	NO
Children		No
Persons who are intellectually or mentally impaired		No
Persons who have experienced traumatic or stressful life circumstances		No
Persons who are HIV positive		No
Persons highly dependent on medical care		No
Persons in dependent or unequal relationships		No
Persons in captivity		No
Persons living in particularly vulnerable life circumstances		No

If "Yes", indicate what measures you will take to protect the autonomy of respondents and (where indicated) to prevent social stigmatisation and/or secondary victimisation of respondents. If you

QUESTION 3.2

Will data collection involve any of the following:	YES	NO
Access to confidential information without prior consent of participants		No
Participants being required to commit an act which might diminish self-respect or cause them to experience shame, embarrassment, or regret		No
Participants being exposed to questions which may be experienced as stressful or upsetting, or to procedures which may have unpleasant or harmful side effects		No
The use of stimuli, tasks or procedures which may be experienced as stressful, noxious, or unpleasant		No
Any form of deception		No

If "Yes", explain and justify. Explain, too, what steps you will take to minimise the potential stress/harm.

QUESTION 3.3

Will any of the following instruments be used for purposes of data collection:	YES	NO
Questionnaire (Appendix One)	Yes	
Survey schedule	Yes	
Interview schedules (Appendices Three and Four)	Yes	
Psychometric test		No

Other/ equivalent assessment instrument	Yes	
Observation schedule (Appendix Two)		

If "Yes", attach copy of research instrument. If data collection involves the use of a psychometric test or equivalent assessment instrument, you are required to provide evidence here that the measure is likely to provide a valid, reliable, and unbiased estimate of the construct being measured. If data collection involves interviews

QUESTION 3.4

Will the autonomy of participants be protected through the use of an informed consent form, which specifies (in language that respondents will understand):	YES	NO
The nature and purpose/s of the research	Yes	
The identity and institutional association of the researcher and supervisor/project leader and their contact details	Yes	
The fact that participation is voluntary That responses will be treated in a confidential manner	Yes	
Any limits on confidentiality which may apply	Yes	

That anonymity will be ensured where appropriate (e.g. coded/ disguised names of participants/ respondents/ institutions)	Yes	
The fact that participants are free to withdraw from the research at any time without any negative or undesirable consequences to themselves	Yes	
The nature and limits of any benefits participants may receive as a result of their participation in the research	Yes	
Is a copy of the informed consent form attached? (See Appendices Six, Seven and Eight)	Yes	

If not, this needs to be explained and justified, also the measures to be adopted to ensure that the respondents fully understand the

QUESTION 3.5

Specify what efforts been made or will be made to obtain informed permission for the research from appropriate authorities and gate-keepers (including caretakers or legal guardians in the case of minor children)?

Letters of consent will be sent to all participants (See Appendices Six, Seven and Eight) and permission will be requested from the Department of Education. The correct channels for ethical clearance as stipulated by UKZN will be followed.

QUESTION 3.6

STORAGE AND DISPOSAL OF RESEARCH DATA:

Please note that the research data should be kept for a period of at least five years in a secure location by arrangement with your supervisor.

How will the research data be disposed of? Please provide specific information, eg shredding of documents incineration of videos, cassettes, etc.

The data will be kept by me, the project leader, in my office Room 42A, Faculty of Education, Pietermaritzburg Campus, UKZN. After 5 years documents will be shredded and cassettes incinerated.

QUESTION 3.7

In the subsequent dissemination of your research findings – in the form of the finished thesis, oral presentations, publication etc. – how will anonymity/ confidentiality be protected?

Ethical issues which will be taken into consideration are: consent from the participants, the respondents will be made aware that they are able to withdraw at any given time if they so wish should they feel threatened or uncomfortable in any way. The school principals will be ensured that the school names will be protected as well as the identities of all the participants in the research. Consent letters will be completed by all participants. Permission from the Department of Education to do the research will be obtained. Ethical clearance from UKZN will also be sought. Literature in the literature review will be acknowledged and properly referenced.

QUESTION 3.8

Is this research supported by funding that is likely to inform or impact in any way on the design, outcome and dissemination of the research?	YES	NO X
---	-----	-------------

If yes, this needs to be explained and justified.

QUESTION 3.9

<p>Has any organization/company participating in the research or funding the project, imposed any conditions to the research? YES/NO</p> <p>No</p>
--

If yes, please indicate what the conditions are.

N/A

SECTION 4: FORMALISATION OF THE APPLICATION

APPLICANT

I have familiarised myself with the University's Code of Conduct for Research and undertake to comply with it.
The information supplied above is correct to the best of my knowledge.

NB: PLEASE ENSURE THAT THE ATTACHED CHECK SHEET IS COMPLETED

<p>.....</p> <p>.....</p> <p>SIGNATURE OF APPLICANT</p>	<p>DATE</p>
--	--------------------

SUPERVISOR/HEAD OF SCHOOL

<p>NB: PLEASE ENSURE THAT THE APPLICANT HAS COMPLETED THE ATTACHED CHECK SHEET AND THAT</p> <p style="padding-left: 40px;">THE FORM IS FORWARDED TO YOUR FACULTY RESEARCH COMMITTEE FOR FURTHER ATTENTION</p>
<p>DATE:</p> <p>SIGNATURE OF SUPERVISOR/ PROJECT LEADER : _____</p>

RECOMMENDATION OF FACULTY RESEARCH COMMITTEE/HIGHER DEGREES COMMITTEE	
The application is (please tick):	
<input type="checkbox"/>	Approved *
<input type="checkbox"/>	Recommended and referred to the Human and Social Sciences Ethics Committee for further consideration
<input type="checkbox"/>	Not Approved, referred back for revision and resubmission
* Senate has delegated powers to Faculty Committee to:	

- Approve Undergraduate and Honours projects

- Approve Masters projects (if the required capacity exists within the faculty)

NAME _____ **OF** _____ **CHAIRPERSON:**

_____ **SIGNATURE:** _____

DATE

RECOMMENDATION OF UNIVERSITY RESEARCH ETHICS COMMITTEE (HUMAN AND SOCIAL SCIENCES)

NAME _____ **OF** _____

CHAIRPERSON: _____ **SIGNATURE** _____

DATE.....

UNIVERSITY OF KWAZULU-NATAL

RESEARCH OFFICE

HUMAN AND SOCIAL SCIENCES ETHICAL CLEARANCE APPLICATION FORM

CHECK SHEET FOR APPLICATION

PLEASE TICK

1. Form has been fully completed and all questions have been answered	Y
2. Questionnaire attached (where applicable)	Y
3. Informed consent document attached (where applicable)	Y
4. Approval from relevant authorities obtained (and attached) where research involves the utilization of space, data and/or facilities at other institutions/organisations	In process
5. Signature of Supervisor / project leader	Y
6. Application forwarded to Faculty Research Committee for recommendation and transmission to the Research Office	Y

APPENDIX SIX



Faculty of Education

University of KwaZulu-Natal

Private Bag X01

Scottsville

3209

The Principal

.....

.....

.....

Dear

I am currently a student at the University of KwaZulu-Natal, Pietermaritzburg. I am presently engaged in a group research project which aims to explore teacher leadership and its relation to issues of professionalism 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 transforming the teaching and learning in our South African 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 as it relates to issues of professionalism in your school, and work particularly with five teacher leaders who are willing to work closely with me to extend 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 and they will be free to withdraw from the research at any time without negative or undesirable consequences to themselves. In this regard, participants will be asked to complete a consent form. Furthermore, in the interests of the participants, feedback will be given to them during and at the end of the project.

My project leader, I can be contacted on 033-2606185 at the Faculty of Education, Room 42A, Pietermaritzburg Campus (School of Education and Development) or on her cell, 0844003347.

Please feel free to contact me at any time should you have any queries or questions you would like answered.

Yours sincerely

Bronwyn Alexander



Faculty of Education

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 for my school to be a research school in this project.

Signature of Principal

Date

.....

.....



Faculty of Education

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 for m school to be a research school in this project.

Signature of Principal

Date

APPENDIX EIGHT



Faculty of Education

University of KwaZulu-Natal

Private Bag X01

Scottsville

3209

Letter of Invitation

Dear

I am sending this invitation to you as a teacher who might be interested in participating in a research project about teacher leadership and its relation to professionalism in schools. My name is Bronwyn Alexander and I am currently a student at the University of KwaZulu-Natal, Pietermaritzburg. I am presently leading a group research project which aims to explore teacher leadership as it relates to issues of professionalism 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 transforming 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 as it relates to issues of professionalism 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 question:

How can teachers lead schools better to ensure that they are professional places of teaching and learning?

Subsidiary Questions

4. How is professionalism understood by teachers?
5. What are the factors which enhance or inhibit teacher leadership and professionalism in schools?

I am seeking five 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.

Our project leader, can be contacted on 033-2606185 at the Faculty of Education, Room 42A, Pietermaritzburg Campus (School of Education and Development) or on my cell, 0844003347. Please feel free to contact her at any time should you have any queries or questions you would like answered.

Yours sincerely

Bronwyn Alexander



Faculty of Education

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 Teacher Leader

Date

.....

.....