

UNIVERSITY OF KWAZULU-NATAL

**VISIONARY TEACHER LEADERSHIP:
A CASE STUDY OF THREE TEACHER
LEADERS IN A SEMI-URBAN PRIMARY
SCHOOL**

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Master of Education: Education Leadership, Management and Policy.
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2010**

DECLARATION

I, KEVIN STEVEN GUNKEL, declare that the work presented in this document is my own. References to work by other people have been duly acknowledged.

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

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ABSTRACT

Teacher leadership is a relatively new concept in the South African educational field, with a few studies recently conducted. As a school principal, I have long held the incontrovertible view that it is the innovative and committed leadership of all stakeholders, teachers in particular, that is required for school improvement. Collectively, the experience, qualification, skills and passion of teacher leaders forms the cornerstone for collegiality, partnership and wide-scale participation in transforming schools into centres of excellence.

Given the hierarchical and autocratic policies of the apartheid regime, distributive leadership through teacher leadership is one of the requirements for the transformation of the South African education system. Arguably, this cannot be achieved by a simple policy shift that advocates for teacher leadership alone. The education landscape is too complex for such a linear shift. The result might be the creation of “policy symbols”, a situation that must be avoided at all costs. Neither do I advocate that teacher leadership is infallible since such a position could render the detractors of teacher leadership impervious. There have, however, been a number of crucial policies formulated in the post-apartheid era that encourage teacher leadership, the Norms and Standards for Educators (2000), for example.

Given the background above, I attempted using a case study of three level one teacher leaders, to depict the enactment of teacher leadership in a semi-urban primary school in KwaZulu-Natal. I employed a multi-pronged data collection method by the use of a focus group interview, semi-structured individual interviews, observation as well as journals that were kept by each respondent. I used the model by Grant (2008) to map the zones and roles of this enactment.

The findings of this study indicated that teacher leadership, particularly within the school, was existent and ubiquitous. Teacher leadership across schools and into the community, though, was minimal. The incomparable commitment, risk-taking approach and vision of teachers formed part of the enhancing factors of teacher leadership. However, the main factors that hindered authentic and fluid teacher leadership related to inadequate time, hierarchical school structures and the mistrust among teachers themselves, among others. Teacher leadership was understood differently by each of the three respondents, since the concept, understandably, is relatively new and under-researched in South Africa.

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CHAPTER ONE

INTRODUCTION AND BACKGROUND TO THE STUDY

1.1 INTRODUCTION

Universal concepts such as religion, philosophy and culture, amongst others, have defined humankind for centuries. It is my belief that both formal and informal education has attempted to shape these phenomena, and the success of each depends upon the innovation and commitment by leaders in various fields of science, politics and religion. In the global village of the 21st century, where disconcerting occurrences such as global warming, diseases such as HIV/AIDS and swine flu, war and terrorism are commonplace, it is only visionary leadership that can extricate mankind from such gloom. Visionary leadership offers hope. Hope in return, rekindles the desire to aggregate our collective efforts to transform and change the myriad of global challenges we face.

The call for change, as polemically expressed by Obama (2008), is required for the survival of all organisations, political, religious or educational. In a message of hope and unity aimed at the American populace, the concept of the collective is encapsulated in the ‘yes *we* can’ slogan and mantra. The notion of unity and collegiality is further concretised in “they saw America as bigger than the sum of our individual ambitions; greater than all the differences of birth or wealth or faction” (Obama, 2009, p. 129). The ideal global village is therefore perceived as one where universal peace is attained through empowering the masses with choice: choice that would be largely realised through democracy. Inherent within this paradigm lays the empowerment of nations through quality and relevant education to meet the demands and complexities of the 21st century.

Countries in Africa, on the other hand, face multiple challenges relating to poverty, corruption, war, and illegitimate and dictatorial governments. In my view, greater visionary leadership is therefore required than in most Western countries where democracy already has been established. Such autocratic leadership, with its emphasis on the hoarding of power, has led to the decline of education standards, and in some instances, ineffective or no education at all. I am of the opinion that what is required is not necessarily a quantum leap from current educational practices, but a gradual shift towards sharing and distributing leadership amongst many more role players than presently occurs. In the South African context, the notion of sharing is convivially undergirded by

Mbeki (1996, p. 4) in a parliamentary speech during the adoption of the Constitution of South Africa when he stated that we should “draw on the *accumulated experience* and *wisdom* of *all humankind*, to define for ourselves what we want to be...however much we may be caught in the fashion of cynicism and loss of faith in the *capacity* of the people...nothing can stop us now”(emphasis added). Similarly, Christie, Butler and Potterton (2007, p. 90) indicate in their ministerial report that “Schools that Work show that it is possible for schools in the mainstream of South Africa to achieve, and they stand for optimism, human agency and hope”.

This is an appeal to those in formal leadership to recognise the contribution ‘followers’ have to offer, and Jansen (2005 p. 204) affirms that “leadership is as much a spiritual connection to the hearts of people as it is a managerial concern about professional performance”. On the educational front then, we must interpret this as simply, literally and practically to mean ‘all humankind’ inclusive of all teachers and their ‘accumulated experience and wisdom’, for therein lies the immeasurable benefit of collective leadership that can best be utilised within schools.

Teachers as leaders serve as ‘human agency’ of change and operate within structures in their organisations (Spillane, 2006). This collective leadership within schools is referred to as *teacher leadership* within this study. The intimation by Jansen (2005) that there exists an inextricable link between leadership and management is well-founded and bears significance within the confines of this study.

Against the backdrop of these introductory comments, the purpose of this dissertation is to explore the enactment of teacher leadership as mechanism for change. This chapter offers an executive summary of the dissertation and provides the background and rationale to the qualitative case study of the enactment of teacher leadership in a semi-urban primary school in KwaZulu-Natal. It also introduces the reader to the methodology and methods adopted in the study as well as the theoretical framing used. The following section explores the pivotal relationship between the concepts of leadership and management and its concomitant impact on the concept of teacher leadership.

1.2 LEADERSHIP AND MANAGEMENT: DUALISM OR DUALITY?

The concept of ‘management’ overlaps with two similar though differentiable terms, ‘leadership’ and ‘administration’. According to Bush (2006), the terms leadership and management are widely used in Britain, Europe and Africa, while the term administration is preferred in the United States of America, Canada and Australia. In the South African context, the concepts of leadership and management are used interchangeably, but for the purpose of this study, I use leadership as the overarching concept and management as a sub-function of leadership. In my view leadership has to do with higher order considerations designed to improve staff, learner and school performance and is value-laden, visionary and people-centred. Management has to do with routine maintenance of operations such as placing staff into job profiles, having time tables and rosters in place, and managing school finances in accordance with policy dictates, amongst others. Administration has to do with lower order duties such as filing and typing and is typically associated with an individual formally appointed to this position. However, in our schools in South Africa, the teacher leader often has to take on all three roles in pursuit of excellence simply because they have the ability to do so, volunteer their services where resources are unavailable, or mentor others in each function.

Leadership, according to Law and Glover (2000), is seen as an aspect of management, with real leaders possessing charisma and visionary flair, much in line with the view of the ‘great man theory’. Whilst many a great leaders can be extolled for introducing organisational renewal through charisma and vision, it is difficult to imagine the unabated sustaining of this individualistic leadership style given the complex realm of education (Rutherford, 2006). Gone are the days of the lone principal quietly toiling away within the confines of his office without imploring the collective assistance of his team within the school. As Gronn (2003) points out, the traditional view of leadership places emphasis on the individual with narrowly-defined targets, than on the collective. The focus has been on those that occupy ‘formal management positions’ and an approach that “defines leadership chiefly as a function of individual personality, ability, traits and style” (Spillane, 2000, p. 6). Astin and Astin (2000) view leadership as a process that works towards movement and change in an organisation, whereas management is perhaps viewed as the antithesis where stability, preservation and maintenance of the organisation are more desirable.

On the other hand, Dunklee (2000) defines leadership as determining organisational objectives and strategies, building agreement for meeting those objectives, and influencing others to work

towards these objectives. Such a definition lends credence to the idea that leadership is much more than the genius of the single leader. Management, according to Dunklee, (ibid) is a process of developing plans to implement strategies and control resources to achieve organisational objectives. Stated otherwise, leadership is about creating a vision, inspiring people, setting goals and achieving these together. Management, in contrast, is about developing systems and structure, carrying out plans efficiently and working with staff. Given the current demands on school improvement within a demanding and complex environment, it can be reasonably inferred then that both principals and teachers require leadership as well as management skills. For a learning organisation such as school, Spillane (2000) cites Likert (1967) and indicates that leadership and management cannot be at polar ends as both the task-oriented and relationship-oriented approaches are required. Grant (2006) points out that the concepts of 'leadership' and 'management', like many other terms within education, remain heavily contested, and are defined differently by various scholars in each country. The view of Kotter (1990) that the two processes complement each other and that both are needed for the prosperity of an organisation is a view I readily concur with.

Teacher leadership is highly dependent on both good management and visionary leadership, and in fact there is ample fidelity between the two concepts. In order for teachers to lead successfully within their various roles and zones, within and beyond the school, they need firstly to develop skills relating to time management, risk taking, curriculum and interpersonal relationships. These are in turn dependent on a leadership style with emotional intelligence at the core (Goleman, 1998). Such leadership emphasises self-awareness, self-regulation, motivation and empathy amongst others. Teacher leadership is further strengthened when individuals find accord between emotional intelligence and a desire to embrace democratic values. With this understanding of the relationship between the concepts of leadership and management and their connection to the concept of teacher leadership, I move on to sketch the background to my study.

1.3 BACKGROUND TO THE STUDY

1.3.1 Towards democratic education in South Africa

The South African educational system during the apartheid era can be defined as one premised on highly centralised decision-making processes and had well-developed structures to implement policy. Typically, this top-down administration of the past proceeded without the consultation or participation of those who implemented policy, particularly in former Black schools. Both teachers and principals were viewed as unquestioning implementers of national policy and curriculum through autocratic leadership in order to propagate racial and intellectual segregation.

The newly elected South African government and single, inclusive National Department of Education of 1994 inherited complex and outdated organisational structures. These ineffective structures can best be defined as being rule-driven, shrouded in secrecy, non-participatory and committed to a steep hierarchy (Gally, 1996). The vestiges of the fragmented system of education during apartheid are still evident in the dependence of many schools on the state to formulate clear visions on self-management, poor Grade 12 results, and the focus on those in formal management positions and their accountability. I do not think that the former teacher training of the apartheid era, defined by indoctrination rather than critique, as well as its pedagogical insularity, would stand the test of the global challenges of the 21st century. With the global demands on Mathematics and Science education and given the poor training of South African teachers in these fields, it is hardly surprising that South Africa came last of the fifty participating countries in the 2003 TIMSS (Trends in Mathematics and Science Study) test for Grade 8 learners (Reddy, 2006). This has relevance given that two of the three teacher leaders in my study have attempted to address this problem in their school by registering with higher education bodies, as well as leading community projects in Maths and Science.

This study attempts to highlight the dislocation between the traditional notion of single leadership in a school by advocating for teacher leadership as an additional form of leadership to leadership from those who hold formal management positions such as the School Management Team (SMT). The Task Team Report on Education Management and Development (1996, p.30) further pronounces on collegiality by stating that “the approach to education management which we propose is an integrative and collaborative one: collaborative in that it involves all staff and stakeholders, integrative in so far as it informs all management processes...it links goal setting, policy making, planning, budgeting and evaluation at all levels of the school”.

The educational environment in South Africa points to diverse layers of complexities and paradoxes. What initially appeared as a simple, and yet commendable attempt by policy-makers during the early post-apartheid era to introduce self-governing and democratic schools (see for example the South African Schools' Act of 1996), has turned out far more challenging. Therein lies the complexity: transformation is complex and requires visionary leadership, committed management as well as an intellectual understanding of the systemic nature of change (Fullan, 1992). In general terms, democracy is enshrined in the preamble of the Constitution of the Republic of South Africa (1996) by stating that the country needs to heal the divisions of the past by developing a society based on democratic values and social justice, as well as to free the potential of each person. According to Thurlow (2003), changing the South African education system is only possible if there is harmony between the vision for transformation and the day-to-day realities of those working in the system, and in this study, the importance of teacher leaders. It is teachers in various leadership roles and zones (Grant, 2008) that take centre stage, plying their craft within the classroom, in the whole school as well as in the community.

To a large degree, the scope, type, frequency and format of teacher leadership has been determined by a myriad of policies, acts and regulations promulgated by the South African Department of Education. The principal purpose is to make schools more collaborative, democratic, flatter and self-governing. The Norms and Standards for Educators (2000), the South African Schools Act (1996), The Task Team Report on Education Management and Development (1996), the Integrated Quality Management System (1998) for educators and, more recently, the Quality Learning and Teaching Campaign (2009) aim at creating the space for a more democratic form of school leadership and governance. There has therefore been a concerted effort by the Department of Education to refocus the vision, purpose and direction of education (Bush, 2003) in order to meet the transformational and developmental agenda of the state (Pampallis and Motala, 2001) and, in so doing, turn schools into centres of excellence, with teacher leadership at the centre.

In the Norms and Standards for Educators (2000), there is a clear emphasis on teachers to take up more leadership roles than those confined solely to the classroom and curriculum delivery. Teacher leadership plays a cornerstone function in the implementation of this new approach with practical, foundational and reflexive competences key in each role. The seven roles described in the Norms and Standards for Educators (2000) indicate that teachers are to participate in include interpreter and designer of learning programmes and materials, scholar and researcher, as well as

curriculum specialist. However, it is the ‘leader, administrator and manager’ role that serves as a departing point in this study, with an emphasis on both the school as well as the community with its pastoral roles. These competencies are expected to be performed in ways which are democratic and that demonstrate responsiveness to changing environments and needs of the school.

Democracy underpins the formal school structures found in the South African Schools Act (1996). The compilation of the Code of Conduct for learners, for example, stresses the importance of learner participation through the Representative Council of Learners (RCL) through democratic processes. The very election of the RCL is democratic in nature, unlike the apartheid-styled prefect system chosen largely by the head or teachers of the school. The School Governing Body (SGB) also undergoes democratic processes in its constitutionality, and teachers that serve as representatives of the staff on this body are in turn democratically elected onto it (DoE, 1996).

1.3.2 Transforming education through teacher leadership

The transformation of the educational landscape in South Africa will only succeed through the participation of all stakeholders and, in particular, teachers in the practice of leadership. No amount of incantation will automatically extricate the country from poor performance such as witnessed in the national testing of primary school learners in Mathematics and English for example. Visionary leadership of those leading both formally and informally and the view that all can lead is what is required (Barth, 1998). Teacher leadership provides the constant supply of latent and inherent leadership expertise evident in the many years of experience, multiple yet diverse qualifications, zeal to serve voluntarily on school and community-based committees, all of which can only lead to school improvement and effectiveness. This contemporary paradigm is encapsulated in “the purpose of an organisation is to enable ordinary human beings to do extraordinary things...no organisation can depend on genius alone; the supply is always scarce and unreliable” (Drucker, 1988, p. 361).

More recently, educational leadership has been defined as those individuals that possess esoteric skills and emotional intelligence, are reflexive practitioners, drive vision and teamwork, influence tactics and politics in schools (Coleman, 2005). Although the definition appears to be associated with headship and those who hold formal management positions, it can and must be linked to teacher leadership as well. Katzenmeyer and Moller (2003, p. 11) indicate that “all teachers can select appropriate leadership roles for themselves, given their experience, confidence level, skills and knowledge”. Within the South African context, The Norms and Standards for Educators

(2000, p.10) indicates that educators are required to “work with other practitioners in team-teaching and participative decision-making”. Grant (2006) argues that teacher leadership is therefore implicit within the South African education policy documents as contemplated by policy makers, and in particular, the view that leadership and management of schools is “seen as an activity in which all members of educational organisations engage” and “should not be seen as the task of a few” (Department of Education, 1996, p.27). Harris and Muijs (2005, p.31) state that teacher leadership can best be accomplished by a distributed form of leadership wherein “multiple sources of guidance and direction, following the contours on an organisation, made coherent by a common culture”. The heterogeneity of the South African teaching landscape lends itself to the strengthening of this culture of collective leadership and is in any event advantageous for schools as it offers a new angle for schools to cooperate rather than compete for leadership space.

1.4 RATIONALE FOR THE STUDY

I have long held the view that it is the relentless and often unnoticed toil of both male and female teachers that catapults schools into the limelight of success. Muijs and Harris (2003) indicate that not only do principals need to distribute authority, but teachers too must take up leadership roles and be agents of change and school reform. In a small-scale study conducted by Grant (2005), the situatedness and context of leadership was highlighted, with female teachers urged to take on more leadership roles both in the classroom, into areas of whole school development, as well as the community. This study earmarked both male and female participants with the view of exploring how they enacted leadership on a daily basis in their schools. With the exception of the National Teacher Awards in South Africa, there exists no other formal platform that officially recognises teacher leadership. Very often, it is the principal and the management team that features in publications receiving accolades for school improvement initiatives.

My movement through various management levels of the school system due to promotion from post level one teacher for eleven years, head of department for two years, deputy principal for two years and principal for nine years has placed me in the unique position of having worked with many teacher leaders in the past. From a personal perspective, I readily took on leadership roles over many years ranging from acting head of department for Mathematics and Science, to hostel master, union leadership as well as community office bearer positions such as serving on community police forums and as a board member of a hospice society. My tenure at the three schools, one high school and two combined schools in two different provinces of the country, placed me in an advantaged position as I witnessed expansive and vibrant teacher leadership

without formally realising it (Fink, 2005). In addition, I witnessed teacher leadership as 'restricted' and 'extended' professionalism, where many worked within their classrooms as well as beyond the classroom to include neighbouring schools and community-based organisations and structures (Hoyle, 1980). This experience provided the motivation for my study in which I aimed to capture these choices teachers took in a detailed and descriptive manner.

The qualitative self-study on teacher leadership by Pillay (2008), the study by Ntuzela (2008) on teacher leadership as well as the case study by Singh (2007) had some aspects of the impact of the SMT on teacher leadership. I opted in my study to conduct qualitative research into teacher leadership in a neighbouring primary school without confining it to any pre-determined impact of formal leadership on the enactment of teacher leadership. The principle of attempting to vividly depict teacher leadership in its natural environment, with minimal structured questions, formed the basis of my study. The quantitative study by Khumalo (2008), although confined to schools in a particular education district, confirmed the notion that teacher leadership was prevalent in many schools in South Africa. I thus did not seek to verify the existence of teacher leadership but rather to explore how it was enacted by different teachers in a single primary school.

Teacher leadership as a concept and practice, as well as distributive leadership theory have been well-documented internationally by scholars such as Little (1995), Lieberman, Saxl and Miles (1988), Gronn (2000), Katzenmeyer and Moller (2001), Day and Harris (2003), Muijs and Harris (2003) and Gunter (2005), amongst others. Given the few studies on teacher leadership in South Africa, I hoped that the data generated from my study would contribute to the existing literature by means of the detailed case study of the three teacher leaders in action in a semi-urban primary school. This serves to mitigate in a small way, the plea by Grant (2006) that there is a distinct gap in the literature on teacher leadership in South Africa.

1.5 RESEARCH QUESTIONS

The following questions served as a guide to my study:

1. How is teacher leadership enacted in a semi-urban primary school?
2. What are the factors that hinder or promote this enactment?

1.6 METHODOLOGY

This study was qualitative in nature and can be defined as having fitted within the interpretive paradigm. My aim was to descriptively depict teacher leadership among three teachers, my primary participants, in post level one positions in a semi-urban primary school in KwaZulu-Natal. In order to richly capture their enactment of teacher leadership, I employed a multi-pronged approach to the collection of data that included observing the broad school ethos and its structural and cultural impact on teacher leadership using a school observation tool. The use of a questionnaire assisted in deepening the overall understanding of teacher leadership within the study as it afforded the participants, both primary and secondary, an opportunity to record their own understandings of leadership matters in their school. Similarly, the extensive use of journals kept by the three primary participants served to capture their individual experiences of teacher leadership. I also conducted a focus group interview with all three participants, followed by semi-structured individual interviews. The data were inductively analysed with the principal focus of generating themes using the model of teacher leadership defined within zones and roles (Grant, 2008).

This case study constituted part of a broader group research project involving myself and ten fellow Master of Education students.

1.7 CONCEPTUAL FRAMEWORK

This study used distributed leadership theory, with an emphasis on collaboration, shared decision-making, formal and informal leadership and teamwork as its basic tenets. This is akin to the underpinnings of the volumes of international literature on teacher leadership, as poignantly captured by Katzenmeyer and Moller (2003, p.1) in “teachers who 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”. Similarly, I alluded to the need for teachers to take up leadership roles in the *Rationale* as well as the *Topic* of this study. I aligned myself with the explication offered by Harris (2005, p.80) who argues that teacher leadership “is a shared commodity owned by those that work within the school”. It includes teachers working collaboratively, with all stakeholders, towards a *shared vision* of their school within a culture of mutual respect and trust. (emphasis added)

1.8 LAYOUT OF THE DISSERTATION

This dissertation is presented in the following manner:

Chapter One deals with the background of the study on teacher leadership, with an emphasis on management and leadership, literature that informed the study as well as the rationale for undertaking the study. I linked the methodology and conceptual framework briefly in this chapter.

Chapter Two outlines both the international and South African literature I reviewed on teacher leadership. Internationally, teacher leadership was confined to literature emanating from the United Kingdom, Canada, United States of America, as well as Pakistan. In *Chapter Three*, I discuss the methods and methodology used in the research, as well as ethical issues and the limitations of the study. The findings of my research are discussed in *Chapter Four*, and *Chapter Five* presents the discussion of the findings, as well as recommendations for future research.

CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

Reform initiatives in education in South Africa follow similar trends to that of the rest of the world. These reform initiatives rest on the assumption that participation of educators can enhance the achievements of the desired transformation in education (Mosoge and van der Westhuizen, 1998). In today's complex organisations, very few things can be accomplished alone. Processes of shared decision-making and suitable structures are related, and success within the system can only be acquired by the devolution of authority and the sharing of leadership at school level (Mosoge and van der Westhuizen, 1998). The days of the lone genius quietly toiling away in pursuit of that 'eureka' moment to revolutionise an industry are all but over...school management teams and principals are now in the days of asking and listening to colleagues, parents and learners, and working with them in innovative cycles.

Although the vision for a transformed education system in South Africa has been set out in the South African Schools' Act (Act 84 of 1996) and new legislation, the system is still influenced by the ethos, systems and procedures inherited from the colonial and apartheid past. The report of the National Task Team on Education Management Development in South Africa (1996) identifies the following legacy in education:

The public administration legacy: Public administration was characterised by a hierarchical structure with authoritarian management styles. The new department of education inherited these structures and management styles (Department of Education, 1996, p 13).

This chapter focuses on attempting, firstly, to understand how both international and South African literature defines teacher leadership. The chapter focuses more specifically on distributed leadership theory, with teacher leadership as the conceptual framework. To begin the literature review, I sketch the literature terrain on teacher leadership.

2.2 TEACHER LEADERSHIP: SKETCHING THE RESEARCH TERRAIN

There currently exists a plethora of international literature on teacher leadership with extensive research undertaken in the USA and Canada during the past few decades. Studies within these two countries have been undertaken by scholars such as Lieberman, Saxl and Miles (1988), Wasley (1991), Little (1995) Ash and Persall (2000) and Katzenmeyer and Moller (2001). However, more recently, teacher leadership studies have been conducted in the United Kingdom by researchers that include Muijs and Harris (2003), Harris and Muijs (2005), and Gunter (2005), amongst others.

This literature review is not based on a chronology of the development of research on teacher leadership but rather seek to link the main concepts and key research findings of various scholars. The purpose for such an approach is to emphasise that some countries have long been attempting to build teacher leadership into the broader education system, in other words to develop a *culture* of teacher leadership in schools. The analysis of the literature indicates that such an endeavour remains elusive, simply because the concept is still being researched in some counties like South Africa and New Zealand, and that its very informal, unstructured nature makes for difficult policy formulation by authorities.

Lieberman, Saxl and Miles (1988, p.148) address this policy issue by stating that “on the political level, some states and school districts are creating new roles and new structures in an attempt to change the social relations of the people who do the work at the school level”. They continue to argue that the leap from report to reality is a difficult one for there are few precedents, few models, and no guidelines. This must however be contextualised in that this research in the USA took place some 20 years ago, and that many more international studies into teacher leadership began to clearly define the concept, identify roles and zones, and characterise elements that serve as barriers to teacher leadership (Gehrke, 1991; Griffin,1995; Harris and Lambert 2003; Grant, 2008) ,among others.

Within the South African education arena, studies into teacher leadership have been few and recent and therefore teacher leadership in this country requires greater research beyond the level of perception and description. For example, the study by Grant, Gardner, Kajee, Moodley and Somaroo (2008) as well as Khumalo (2008) were both largely quantitative surveys which concentrated on the perceptions of teacher leadership rather than on

observation of teacher leadership. In contrast, my study focuses on the enactment of teacher leadership, and in so doing, attempt to extend the field of research on the topic.

Thus my study makes an attempt to fill a gap in the existing literature. Giltrow (2002, p. 263) refers to this as a 'knowledge deficit' in literature, and states that "in making moves on the knowledge map, the writer identifies a knowledge deficit...the only way a deficit-a gap, a space under-surveyed or inadequately surveyed- can be identified is through a review of what is known". Similarly, Borg and Gall (1989) state that a review of literature is extremely beneficial in that it allows for insights into previous methods, subjects and approaches, and allows for the sampling of current opinions. In the South African context, given the legislative framework that seeks to decentralise control and decision-making, such sampling of teacher leadership can then be regarded as current and emergent. The South African Schools Act (1996), together with the Norms and Standards for Educators (2000), lay the foundation for schools to transform themselves from traditionally hierarchical organisations into democratic institutions that may be regarded as learning organisations (Senge,1990). Teacher leadership as a concept as well as distributed leadership as a theory, are clearly accommodated in these new prescripts, and it remains a paradigm shift then from policy to practice. In the section that follows I move on to define the concept of teacher leadership.

2.3 DEFINING TEACHER LEADERSHIP

The definitions of leadership within education in general, and teacher leadership in particular, can be regarded as varied, complex and problematic. To the novice reader on the subject of teacher leadership, the immediate proposal on attempting to attain the most suitable definition would be to simply identify characteristics in various definitions and combine these for the ideal. This is neither feasible nor prudent since different scholars on the topic research and emphasise different aspects of teacher leadership, and secondly these definitions are geographically bound, for example within the USA, UK or South Africa.

I describe teacher leadership in simple terms and suggest that it may refer to the taking up of roles, either voluntarily, through nomination by peers or by delegation from authority. For the purpose of this study, it is crucial to indicate that these leadership roles are carried out by post level one educators, within and beyond the confines of the school, normally without any financial implications. These 'extra duties' are carried out by these teachers because they have earned the *trust* to lead, they have the *ability* to lead others, and that they view the

success of their schools as integral. Wasley (1991, p.23) defines teacher leadership as “the *ability* to encourage colleagues to change, to do things they wouldn’t ordinarily consider without the influence of the leader”. Similarly, Katzenmeyer and Moller (2001, p.17) define teacher leaders as “teachers who are leaders 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”. In yet another definition, Boles and Troen (1994, p.11) define teacher leadership as a form of “collective leadership in which teachers develop expertise by working *collaboratively*”.

2.4 ROLES AND ZONES OF TEACHER LEADERSHIP

Teacher leaders operate within many zones and occupy specific roles in each zone. In the South African context, for example, Grant (2008, p.93) describes zone one, role one as “continuing to teach and improve one’s own teaching in the classroom”, zone two, role two as “providing curriculum development knowledge within the school”. She continues that zone two, role three is about leading in-service education and assisting colleagues. She explicates that zone three, role five is about organising and leading peer reviews of school practice, and finally, zone four, role two is about providing curriculum knowledge across schools into the community.

The above is similar, generally speaking, to the assertion made by Katzenmeyer and Moller (2001) who see teacher leadership within three broad categories namely, leadership of students or other teachers that includes facilitator, coach, mentor, trainer, curriculum specialist, leading study groups. Secondly leadership of operational tasks such as keeping the school organised and moving towards its goals, through roles such as head of department, action researcher, member of task forces. And thirdly, leadership through decision-making or partnership: membership of school improvement teams, membership of committees, and instigator of partnerships with business, higher education institutions and parent-teacher associations.

I have aligned myself with the definition of teacher leadership as advanced by Katzenmeyer and Moller (2001) since teacher leadership should preferably confine itself to a number of zones and tasks, with the priority on curriculum mastery, followed by leadership within the school, and finally leadership beyond the school. I argue that any other permutation of this order, or the over-emphasis of one zone at the expense of another, will be counterproductive

to school improvement. Anecdotal evidence from my experience as school principal, points to the fact that some teachers take up and advocate one of the above zonal leadership roles, leaving the school void of classroom expertise. A delicate balance between these rudimentary areas is required in order for the development both of the individual teacher, and others, as well as the need to establish the school as a *learning organisation* (Senge, 1999).

Similarly, Lambert (1998) defines teacher leadership for school capacity building as broad-based, skilful involvement in the work of leadership, and further suggests that both the scope or breadth and skill are characteristics of such teacher leaders. Lambert (1998) identifies the broad-based involvement to mean the attempt by teacher leaders to involve as many people or other teachers in leadership opportunities, what I would term *on-site networking*. Within this broad scope, there would exist the working together of colleagues, otherwise referred to as collegiality, in order to get tasks completed. This broad-base focus may include other teachers, parents, pupils, community members and universities, much like the definition espoused by Katzenmeyer and Moller (2001) It is however, not as simple as implied since working together has various tensions, threats, barriers and political dimensions, all be it that some may question the very intention of the teacher leader. These working relations require skill from teacher leaders, and this is precisely the second focus area raised by Lambert (1998). The skills required include a thorough knowledge of the project to be undertaken by the teacher leader, knowledge of the colleagues in the team, referred to as the emotional intelligence of the teacher leader.

At a level of comparison, the researchers above seem to define teacher leadership within three categories, namely classroom expertise, collaboration within the school, and finally, beyond the school into the community. Each zone requires certain discernable skills, either knowledge of curriculum, human relations skills, and ultimately, the ability to forge lasting and authentic links with higher institutions and the community. This is the chief domain of my study.

It is Day and Harris (2003) that build on these definitions by clearly linking these zones of teacher leadership with school improvement. Day and Harris (2003) suggest the need to identify four dimensions of teacher leadership, all impacting on school improvement in that teacher leaders must translate the principles of school improvement into classroom practice and this requires the skilful brokering role and ability to influence colleagues to share the same vision, thus the concept of ownership. Similarly, there is the contention that teacher

leaders should assist other teachers in achieving school improvement by fostering collegiality and collaborative working techniques (Blase and Anderson, 1995). Ultimately, teacher leaders should take up mediating roles since they would possibly be important sources of expertise and information.

The South African Schools Act (1996) equally creates, within the legal framework, the space and opportunity for teacher leadership and a mediatory role through formal structures such as having teachers serve on the School Governing Body, duly and democratically elected by their peers. Similarly, the Integrated Quality Management System, Resolution 8 of 2003, encourages teachers to lead on the Staff Development Team (SDT), as well as on review panels such as the Development Support Group (DSG). Experience at school level clearly points to the fact that teachers differ with regards to the appraisal of each other, and often it is teacher leaders themselves that mediate in these very tense periods at school level.

Furthermore teacher leaders should forge close working relationships with others, and develop trust amongst each other wherein mutual learning takes place (Lieberman, Saxl and Miles, 1988). This entails teachers allowing each other to be observed in practise (Little, 2000). This entails teachers transforming their practices so that schools become democratic organisations where transparency, accountability and best practise for school improvement become the culture of the organisation. Ash and Persall (2000) elaborate further on this point by stating that teacher leaders undertake periodic action research in order to establish areas for improvement, and suggest methods, strategies and time-frames to achieve such improvement. In the South African context, it is policy by the Department of Education to seek SIP (School Improvement Plans) annually from schools, even those that are deemed to be successful (Eastern Cape LAIS Circular 16, 2008) Teachers are called upon to shape the improvement plan that generally incorporates curriculum improvement strategies, human resource deployment, financial planning, infrastructure development and extra and co-curricular activities. It is evident from the discussion so far that Phillips-Jones (1982) cited in Anderson and Shannon (1988) defines mentor as influential people who significantly help protégés reach their life goals, in that they have the power in what they know- to promote the welfare, training or career of their protégés. She classifies these as firstly, the traditional mentors, those typically older and authoritative figures, who over a long period of time, nurture, advocate for and protect their protégés. Professional mentors are counsellors and advisors, and protégés pay for services from these mentors. This can safely be argued as an activity outside schools, probably belonging in the corporate world. Mentoring can focus on

professional or personal development (Clawson, 1980). Professionally, teacher mentors can assist in activities assigned to protégés such as preparing lesson plans together, and sometimes even recommend that their protégés serve on certain school committees. This is the encouraging element of mentoring, and is a process that includes affirming, inspiring and challenging others to attain greater heights.

Still professionally speaking, mentors should open up themselves by allowing their protégés to observe them in action and convey to them reasons and purposes behind their decisions and performance. Mentors should lead incrementally, as any unintended overloaded poorly planned mentoring may have permanent negative repercussions for those being lead. It would be extremely difficult for the mentor to regain the confidence and trust of the protégé once something has gone wrong. It is imperative therefore that mentors should express care and concern at all times, even when this seems impossible, as any inconsistency would equally be difficult to overcome in the future. Schein (1978) cited in Gehrke (1988) argues that mentors are more than master teachers in that they are positive role models, they develop talent, open doors, and they themselves are successful leaders. Schein (1978) argues further that the mentor ought to be more mature, more advanced or more experienced and not a peer. I do not totally agree with such a position as it has been found that teacher leaders in schools at times mentor well although they have less experience than their peers, but have the confidence and background training to lead certain tasks and projects.

2.5 THE RATIONALE FOR ADVOCATING TEACHER LEADERSHIP

According to Darling-Hammond (1987), reports and research from business, education, and state-wide policy groups in the USA in particular, are calling for major changes in the ways schools go about their work and the ways teachers are involved in their decision-making structures. This ‘second wave’ of school reform has been characterised by much talk of restructuring and the professionalising of teaching, much like in a fledgling democracy such as in South Africa. In South Africa today, there is a clear attempt to change the organisational culture of schools from one that fosters privatism and adversarial relationships between and among teachers and principals, to one that encourages collegiality and commitment (Lieberman & Miller, 1984).

The 21st century has seen almost unparalleled calls for school reform, and more recently, equally strong calls for a democratic form of distributed leadership (Ward, 2008). The author

indicates further that calls for distributed leadership arise from the recognition that there is a need for strong instructional leadership if student outcomes are to improve. Amidst these calls, teacher leadership is increasingly being viewed as an important tool for school reform, as a 'sleeping giant' whose time has come (Katzenmeyer and Moller, 2001). It is a way of distributing instructional leadership across schools, and thereby, providing a sustainable model of leadership which is not solely dependent on senior management.

Reform within education is ubiquitous and, in order to sustain change, the emphasis on teacher leadership within broader leadership literature is central to this sustainability (Hargreaves and Fink, 2006). This is encapsulated in the concept of distributed leadership which "emphasises collective responsibility and collaborative working and the idea that leadership can be exercised by anybody within an organisation" (Ward 2008, p. 2). It suggests that "the essence of leadership lies in the nature of the work, not the position on the organisational chart" (Brooks, Scriber and Eferakoro, 2004, p. 254). Similarly Frost and Harris (2003, p.487) state that the possibility is therefore opened up for "all teachers to become leaders in various ways". In general terms then, Bass (1990, p. 19) defines leadership as the "intention between two or more members of a group that often involves the restructuring of the situation and the perceptions and expectations of the members. Leaders are agents of change".

Teacher leadership, according to Little (2003), is now being utilised more systematically by school and district officials who want to effect change. Ward (2008) argues that within the literature there is a growing body of evidence to suggest that teacher leaders do have the potential to change practice. The research conducted by Ward (2008) in New Zealand points to the value in the education system of having the luxury of teacher leaders. Her study revealed that the mentoring capacity, curriculum support for other teachers and more importantly the professionalization of teaching through the establishment of professional learning communities, remained the focus of the teacher leaders. Furthermore, her study found that teacher leaders designed the most practicable, effective and contemporary resource material for their peers, impacted largely by their everyday classroom experiences.

However, the study by Ward (2008, p. 4) did indicate that "the implementation of teacher leadership through policy initiatives alone will not change deeply entrenched cultural norms such as *privatised* practice". By this, I presume the researcher implies the silo and sometimes individual and secluded teaching styles adopted by many teachers, even in South Africa. My

untested hypothesis leads me to claim that South African teachers still do not readily encourage peer review of their practise for fear of not wanting to encroach on personal, professional space. I similarly wish to state upfront that devising a national ‘policy’ on teacher leadership would never be adequate in attempting to address the post-1994 dilemma in South Africa, particularly in relation to the apparent lack of culture of teaching, learning and service, otherwise referred to as COLTS. What is rather required is the creation of a climate that encourages teacher leadership, using both the bureaucratic structure of the South African school, as well as current policy as legislated in the South African Schools’ Act (Act 84 of 1996).

Teacher leadership, according to Howey (1988), is a natural and necessary outgrowth of the increased demands for excellence being placed on schools, and this requires dynamic forms of leadership. Teachers must assume leadership roles, argues Howey (1988), that will enable them to model methods of teaching, coach and mentor colleagues, study critically and thoughtfully, various aspects of classroom life, develop curriculum and instructional materials and strengthen relationships between the school and home. For Howey, “leadership, including teacher leadership, is ultimately proven in the efforts of others to attempt to scale heights of human achievement and plunge depths of human caring not otherwise envisioned” (1998, p.28).

In addition, Day and Harris (2002) highlight the necessity of shared leadership within schools. They emphasise the need for leadership to move away from transactional to transformational leadership. They propagate for transformational leadership as it focuses on moral values, the setting of directions including vision building, the development of people including individualised support, and the building of relationships within the school community. For them, “implicit in this perspective is the notion of shared or devolved leadership where leadership activity is not the preserve of the principal” (Day and Harris, 2002, p.590). Furthermore, it emphasises the role of the leader, the principal in this regard, by using his or her power through people rather than over them, thus the creation of ‘communities of leaders’, much like the notion by Barth (1990) and Senge (1990). The idea of a shift from transactional leadership to transformational has as its focus one of liberating others and in so doing dispersing leadership to them. Day and Harris (2002) claim that recent assessment of the leadership role of the principal implies that giving others real responsibility and developing others is the best possible way for the organisation to move forward. Their argument is that the kind of leadership required for a school improvement in the 21st century is not simply that associated with a role or function, but is a dynamic interaction between individuals within and

beyond the organisation: the investment in human capital. Similarly, it suggests that leadership is a shared and collective endeavour that engages all teachers within the school (Lambert, 1998).

2.6 TEACHER LEADERSHIP: CONTESTATION WITH HEADSHIP LEADERSHIP?

Traditionally, from the business world at least, it was assumed that only top managers had the competence to make decisions and that staff were hired to do what managers told them to do (Frazier, 1997). There was an emphasis on direction and control, a preference for mechanisation and a treatment of staff as the extension of the machine (Greenwood and Gaunt, 1994). However, more recent conceptions of educational leadership demonstrate a move away from authoritarian models of decision-making towards more collegial views on role relations between school principals and staff (Blase & Blase, 1997). Stated otherwise, the empowerment of the entire institution is becoming the new paradigm wherein the all-powerful control of principal is giving way to a situation where staff members are capable of making meaningful decisions in schools (Gauspari, 1999).

Principals who transform schools into participative, interactive environments create the platform for team work where leadership becomes shared. In teamwork, quality management is central, and the ability to make decisions is widely distributed among staff members, irrespective of their position in the hierarchy. According to Arcaro (1995), quality education is only possible when everybody in a school develops particular attitudes that focus on leadership, planning teacher empowerment, teamwork and continuous improvement. Controversially though, Covey (1999) argues that most people perform at low levels yet possess more talent, intelligence and creativity than their present jobs require or even allow. In a similar manner, Barth (1998) argues that *all* teachers can lead, and that teachers harbour extraordinary, untapped, latent leadership capabilities. However, Barth (1998, p.10) further states that ideally “shared leadership is about delegating to others, giving away to others, or sharing with others the making of important decisions- as long as the curriculum, pupil achievement, staff development and of course, stability were not much altered”. Barth (1998) clarifies his current view on leadership to include that which should embrace the notion of a community of leaders, a place whose very mission is to ensure that students, parents, teachers, and principals all become school leaders in some way and at some time. Critically important is the fact that principals play a key role in fostering or discouraging leadership by teachers.

Simple steps that foster teacher leadership are described by Barth (1998) and these include the correct articulation of the goal of the principal, although this may be risky in the sense that it may not be freely and automatically accepted by all teachers. The point is that there would at least be honesty, clarity and openness in such a declaration by the principal. This can easily be articulated practically in the communications principals have with staff at meetings, conversations, newsletters and memos. Secondly, there must be a genuine relinquishment of power to teachers by principals, affording them to take meaningful decisions around crucial issues relating to finance, curriculum, staff selection and development, amongst others. Thirdly, Barth (1998) argues for consistency amongst principals in entrusting teachers with decision-making opportunities, meaning that, should there be some extraneous query from a department official or even a parent, the teacher firmly remains with a particular project or task and is not chopped and changed unduly. Equally then, there should be a secure platform for the sharing of failure and minimising of blame when the teacher falters. However, I argue that this is not to protect teachers whom, when given tasks, choose to be negligent, either substantively or procedurally, in accomplishing the task. This leads to the next step of the principal attributing success where due and recognising a job well done. Barth (1998, p.64) states that “recognition replenishes a teacher, both personally and professionally”. In the South African context, such recognition is formalised nationally by the recognition during the National Teacher Awards ceremony, an annual event. Although noble and a good starting point, it is my view that such a system recognises too few teachers, is coupled with controversial financial incentives, and seems more like a public relations exercise than a genuine acknowledgement of the successes of teacher leadership.

At school level, it could perhaps be played out by rewarding teachers with ‘time-off’ to go about their personal responsibilities, a luxury very rare given the complex transformation in our South African schools today. Similarly, the principal and governing structure at schools could arrange for school-based awards evenings to recognise teacher leadership, by issuing certificates and accolades locally. In turn local media may be invited to capture such events and it is in these local publications that a face and name are easier to identify and compliment than nationally. The recognition by one’s own peers, by a class of Mathematics students, by our parents and local business partners has far more personal and lasting meaning than any other. At the same time, such an exercise sends a very clear message that the principal cannot do or know everything, that teachers too are capable of leading and receiving recognition for

innovation and commitment. Too often principals are told of how good their schools perform academically, or in co-curricular events, with the association of the school with that of the principal. In recognising teachers, Barth (1998, p. 42) states that by ‘admitting ignorance’ on some matters by the principal, as well as room to acknowledge his own skill and to take some risk, lends to the teacher accepting and handling responsibility. This lays a firm foundation for a community of leaders, an organisation with *full-leadership*.

This may be likened to the argument raised by Ash and Persall (2000) wherein they state that in today’s schools, the principal should create the structure and culture that supports a ‘leader-full’ organisation. The theory by Ash and Persall (2000) is based on the concept of the teacher as leader and the principal as a leader of leaders. The argument clearly points out that many existing schools are still organised along bureaucratic and hierarchical configurations, with teacher isolationism rife, whereas the requirement to meet the complexities of change point to collaboration, sharing of information, learning together, and the joint planning for student improvement, and the need to develop instructional leadership amongst all teachers. Ash and Persall (2000, p.16) emphasise that “leadership is not role specific, reserved only for administrators; rather the job of the school leader is to fashion learning opportunities for the faculty and staff so they can develop into productive leaders”.

This is akin to the argument by Barth (1998) who views schools as organisations wherein all teachers, given the opportunity, can lead, and that such collective leadership is the cornerstone of school improvement. Trust becomes the principle on which leadership is built, and that teachers should be afforded the space and time to be trusted to lead various programmes within schools, but I would hasten to add that trust alone would not deliver the desired outcome. What is required is trust and *support* from the principal and those in formal management positions, as well as the encouragement of innovation and creativity to do things differently, so long as school improvement is achieved. Ash and Persall (2000, p.17) argue that “leadership requires the ability to operate in an environment of uncertainty, constantly learning how to exploit system-wide change, rather than maintain the status quo”. Positive school change is neither top down nor bottom up, but is interactive and participative and the role of the principal is to support leadership throughout the school. Central is the notion that new teacher roles, as supported by the principal, should include interdisciplinary teaching, curriculum development, student assessment, counselling, peer review and parental involvement. These are the basis of the framework model of teacher leadership as researched by Harris and Lambert (2003), as well as the *Analytical Framework for Teacher Leadership*

by Grant (2008). This model is discussed in greater detail in Chapter 4 and Chapter 5 in my findings and the discussion on teacher leadership.

Harris and Lambert (2002) focus on at least four aspects of teacher leadership, viz. adult development, dialogue, collaboration and organisational change. In each area, the authors expatiate on at least four sub-categories, then classify the level of teacher leadership in each. For example, in adult development, the starting point is the definition of oneself in relation to other teachers, those in authority and the community. The most desirable outcome is found in the fourth category whereby the teacher engages colleagues by sharing values, and forms interdependent learning communities. My argument is that it is the principal within the school that can foster or stifle such adult development, either by encouraging self-evaluation by actively propagating the involvement in peer review panels, forging of links with the community by permitting an open-door policy, both from administration and teachers in practise (Steyn, 2000). There should be no competing for community clientele, implying that in today's environment producing effective change and improvement requires good listening skills by principals, collecting and analysing school improvement data collaboratively, the replacement of top-down directives, all provides new opportunities for leadership to *emerge* from the teaching ranks.

2.7 EMERGING OPPORTUNITIES FOR LEADERSHIP

There has long been teacher leaders in schools, many traditionally accepting positions as department chairs, team and grade leaders, curriculum committee chairs and heads, amongst others. With the advent of school and teacher education restructuring efforts, new leadership roles are emerging (Lieberman and Miller, 1990). Arguably though, these teacher leaders were often seen as those in formal positions, at times deputising for the principal due the overload and demand placed on such school heads. Teacher leaders then, according to Howey (1988), are firstly full-time (or part-time) teachers that emerged as leaders by simply taking on new roles just by doing the job daily. No formal training, either pre-service or in-service, prepares teachers for these leadership roles, hence my emphasis on the emergence of teacher leadership, either because of their skill, confidence, experience, or interest in a particular 'faculty' at school.

Within the USA, Ohio and California in particular, opportunities for teacher leadership arise from programmes such as the identification of experienced master teachers appointed to work

with newly appointed incumbents (Zimpher, 1988). Their chief task is to mentor the juniors, and thus they must have skills in continuing to be expert classroom practitioners, as well as the acumen to teach adult teachers. This is not dissimilar to the model used in South Africa, although the appointment to such master teacher positions lies with the Department of Education authorities, thus no open competition previously existed for such posts. This could well change with the newly developed OSD (Occupation Specific Dispensation, Collective Agreement 1 of 2008) that encourages career mobility and recognition based on academic and broad leadership ability amongst teachers not in any formal management positions.

District opportunities arising from the decentralisation of decision-making equally afford teachers the opportunity to lead. Such site-based management allows teacher involvement in decisions about structures and programmes in their schools (Sironnik and Clark, 1988). Although very much a USA initiative, South African school districts, by virtue of legislation and policy of the South African Schools Act (Act 84 of 1996), view schools as juristic persons, and attempt to allow schools to become self-managing institutions. In such circumstances, schools then democratically at best elect and form their own structures, amongst which are the School Governing Body (SGB), school-based Finance Committees, infrastructure and stock committees, sport and cultural committees, each being driven by teacher leaders in conjunction with school governors, but not unduly controlled by them.

Similarly, Professional Development Schools (PDS) in the USA call for links between schools and universities wherein teacher leaders demonstrate their skills. In the school in which I conducted my study, evidence of this existed in the form of public notice boards for example, that the school is an off-campus learning site for the Nelson Mandela Metropolitan University. The principal of this school then alone cannot claim a successful relationship with the university if it were not for teachers that receive training on new leadership courses on site, while others serve as tutors and researchers at the same venue. The enduring success lies with teacher leaders advocating and attending such off-campus sites, both from within and beyond the schools, in other words district-wide ownership, as well as teachers being given the opportunity to influence academic programmes and pedagogy relevant to their individual school contexts.

It is Devaney (1987) that pursues this matter of emerging teacher leadership and she briefly identifies five roles that include:

- *Continuing to teach and improve one's own teaching.*

Devaney (1987) states that the largest category of staff are those that deal with subject matter knowledge, and as such it becomes critical for teachers to be expert in their fields, beginning firstly with their own subject knowledge. Maeroff (1988) describes several programmes to enhance teacher leadership and their subject matter knowledge, thereby professionalising teaching and allowing them to set their own well-informed classroom agendas around curricular matters, having gained the requisite skills. Naturally then, in a developing democracy such as that of South Africa, the introduction of the National Curriculum Statement of 2005 (NCS) resulted in teachers experiencing large gaps in content and methodology of this new challenging system. District offices alone cannot cascade all the new prescripts to the masses of teachers, and therein lies the opportunity for teacher leaders to shape and lead such programmes.

- *Organising and leading peer reviews of school practice.*

Programmes for the development of teachers' ability to examine school practices have been widely used in the USA. Pine (1986) suggests a form of action research to be undertaken by teacher leaders with the view to making recommendations for improvement at the core. Again in the South African context, it is not extreme to compare these two opportunities as afforded in the Integrated Quality Assurance Management System (IQMS). For example, ample opportunity exists in the formal structures of the panels that review peer teaching such as the DSG (Developmental Support Group) comprising of at least one teacher leader and a senior staff member.

- *Providing curriculum development knowledge*

The assumption that undergraduate and graduate courses adequately address all concerns of classroom practice, as well as blue-prints on achieving school effectiveness, is a false claim, according to Klein (1985). I agree with this critique in that the very nature of the changed curriculum in South Africa demands new training on the current NCS, for example, and again teachers who have expert knowledge may be called to lead. In fact, anecdotal evidence at district level points to exactly this issue: teachers are seen to be driving quarterly cluster moderation committees ahead of Subject Advisors and other technocrats, who remain administrators of the system.

- *Participating in school-level decision making*

With the exception of the Pittsburgh Public School District (Jonstone *et al.* 1990) in the USA, it is generally accepted that one learns decision-making primarily by carrying out the tasks authorised or volunteered by teacher leaders. Ideally, schools should become flatter structures, allowing for full participation of decision-making by teachers on site, rather than ~~only~~ permitting top-down decisions only. Senge (1990) alternatively describes this as the *learning organisation* where the organisation exercises team learning, shared vision, professional development, and where people continually expand their capacity to create the result they truly desire. Similarly, the South African Task Team Report on EMD (DoE, 1996) captures this succinctly by stating that in order for schools to overcome resistance, there must be lines of communication, participation by all stakeholders, and an atmosphere of facilitation and support.

- *Leading in-service education and assisting other teachers*

I am of the view that teacher leaders are generally well read at postgraduate level, but this does not imply that those who have not achieved such a level are incapable of leading in our schools. Zimpher (1988) indicates that the creation of graduate professional programmes serves to enhance the skills of teacher leaders, of course laying a sound platform for others to be inspired and follow suit. Such teacher leaders ought to use their new postgraduate skills for the mentoring of peers, all in an effort to realise school improvement initiatives and, as such, they should not simply gather such expertise only for personal gain through seeking career opportunities beyond their schools.

2.8 TEACHER LEADERS AND THEIR LEADERSHIP SKILLS

According to Barth (1988), all teachers have the propensity to lead, and principals need to create an environment that permits, recognises and even rewards such leadership. However, this appears to be an over-enthusiastic position, and I would argue rather that although teacher leadership may be evident amongst some teachers, the level of leadership, its' consistency and characteristics need to be discernable. Lieberman, Saxl and Miles (1988) attempt, much like Harris and Lambert (2003), and to identify, describe, and perhaps view teacher leaders in particular zones and roles when enacting their leadership.

The authors, Lieberman *et al* (1988), undertook their research of 17 teacher leaders, in three different programmes such as in effective schools, large school site committees, and finally in

organic, one-to-one and focus group samples. Teacher leaders, according to Lieberman *et al* (1988) possess *capabilities*, have *strategies* to activate change, and they have both process and content *skills* to accomplish these changes they envisioned. These teacher leaders were capable of teaching at various grades, and were curriculum masters. Secondly, they developed and adapted curriculum to suit their unique contexts, enabling them to easily adapt to the teaching of new curriculum. Their enthusiasm was manifest in their own academic pursuits, perhaps beyond the classroom to post graduate level and generally held many degrees, attended a broad spectrum of courses, conferences and workshops on diverse topics from conflict resolution, teacher effectiveness, to adult development. They were knowledgeable about change processes, and had wide experience in administrative and organisational matters. What was important in the study is the degree of common characteristics amongst the teacher leaders. These can be described further as the knowledge teacher leaders generally had regarding community concerns, some having served as school board members, community organisers, and in a variety of support positions in their schools.

In the Lieberman *et al* (1988) study, leaders were risk takers, willing to promote new ideas that might seem difficult or even threatening to some of their colleagues. They possessed good interpersonal skills and “they knew how to be strong, yet caring and compassionate...helped them legitimate their positions in their schools amidst often hostile and resistant staffs” (Lieberman *et al.* 1988, p.150). They had the propensity to learn on the job, acquiring new understanding of their school cultures, and saw how often teachers worked in isolation in their classrooms. Building up **trust** within the staff was a major challenge, particularly on the egalitarian view widely held by most of their peers that teachers were all the same, differing only in length of service, age and subject knowledge, role and responsibility (Lortie, 1975).

Furthermore, the Lieberman *et al.* (1988) study clearly indicates that teacher leaders supported collegiality, a concept usually propagated by the principal. The study also found that teacher leaders had skills that included the building of trust and rapport, organisational diagnosis, use of resources, management of work, and the building of skills and confidence in others. Some of these teacher leaders carried less class workload, and were viewed suspiciously by peers. Trust became a crucial element of their tenure, and they resorted to clarifying openly their roles within the school, attempting to find legitimacy and credibility amongst peers. This they frequently do by demonstrating their expertise and value to other teachers by conducting on-site workshops in order to address resistance, for example.

Engaging in open supportive communication is also part of building trust, that they could work and struggle together and that they were there for staff in a helping, non-evaluative and non-judgemental way.

Teacher leaders have the skill of organisational diagnosis, the ability to understand the whole school system, a space beyond the confines of the controllable classroom. Similarly, teacher leaders have the ability to collect data constantly, and share diagnosis with others, planning strategies for action together. Critical to the work of teacher leaders is their understanding of the change process, harnessing conflict mediation and confrontation skills, working in collaboration with others. Such collaboration does not come as a natural consequence in a school: it has to be taught, learned, nurtured and supported until it replaces working in isolation.

Teacher leaders typically use resources optimally, and these include people, ideas, materials and equipment in pursuit of collective goals. In so doing they ventured beyond the school at times to form resource networks with the school community in a brokerage manner. This meant that they had to firstly secure resources, and follow this up by ascertaining the correct usage of these resources. Teacher leaders in the above study worked hard to maintain a balance between getting people to work, and providing the content or substance around which they worked. Managing this required skills including time management, setting priorities for work, delegating tasks and authority, taking initiative, monitoring progress and coordinating the multi-faceted tasks assigned to others. These often required administrative mastery and good organisational planning skills, with limited time to accomplish tasks. They learnt to balance the mobilisation of staff to perform tasks with the fine line of not over-managing the process, thus by careful influence rather than mechanistic reviewing of tasks completed. To accomplish this, they had to build skill and confidence in others so that even in their absence, the culture of collaboration continues. They attempted to institutionalise critical and reflective practice. Teacher leaders take up mentoring roles and in the Grant (2008) model, mentoring occurs in zone two and zone four, and in the former, it is about leading in-service education and assisting others beyond the classroom, or rather within the school. In zone four, mentoring occurs across schools into the community, and includes the induction of newly appointed teachers

In the following section, I attempt to draw the inexorable link between the theory of distributed leadership and teacher leadership.

2.9 THE LINK BETWEEN DISTRIBUTED LEADERSHIP AND TEACHER LEADERSHIP

My study is framed by distributive leadership theory, with teacher leadership a component of this framework. Internal school management, in strengthening their leadership, should be more collaborative (Grant, 2006). Gibb, way back in 1954, as cited in Gronn (2000, p. 325), argued that leadership is best conceived as a group quality, and this manifests itself in the theory of distributed leadership where principals are willing to relinquish their power to others and where fixed leader-follower dualisms are abandoned “in favour of the possibility of multiple, emergent, task-focused roles”. According to Bennet *et al.* (2003), this collective distributed leadership is not something done by an individual to others, rather it is an emergent property of a group of network of individuals in which group members pool their expertise. Harris (2004) indicates that such distributed leadership emphasises the need to complement and top-up the already present leadership evident in formal roles and positions, and this requires the engagement of expertise wherever it exists within the organisation. This is referred to as the ‘blind spot’ by Harris (2004) and can best be defined as dangerously seeking guidance and leadership solely from a few individuals such as the principal, head of department or formal grade heads, acknowledging that such formal leaders may not have all the answers to solutions required by the school.

In addition, Harris(2004, p. 13) states that “distributed leadership concentrates on engaging expertise wherever it exists within the organisation rather than seeking this only through formal positions”. Therefore, the move away from a culture wherein formal management positions alone remain the key drivers of decisions in schools, given a country like South Africa with its’ former hierarchical structure, is not a simple matter. Grant (2006, p. 513), states that “teachers need to be encouraged to find their voices, take up their potential as leaders and change agents to produce a liberating culture in schools”. She cites Thurlow (2003, p.37) in her research paper and emphasises that “this requires a radical shift from a culture of dependency to one of empowerment”. Grant (2006) similarly acknowledges that distributed leadership, which in turn includes the concept of teacher leadership, is new in South Africa. This is in contrast to teacher leadership being widely researched, advocated and practised in other countries such as the USA, UK, and Canada. There therefore exists room for further research in South Africa, and it is this study in particular that attempts to gain an in-depth look into teacher leadership by employing a qualitative paradigm by following three teacher leaders in one school very closely over a period of about four months. Such a shift, as

suggested by Grant (2006), would require teachers to take up both formal and informal leadership roles, roles which teachers at best volunteer their expertise, alternatively accept nomination by peers, or at worst, are delegated by principals to carry out tasks based on teachers' interest, skills and experience. These roles are varied and wide and cut across many critical domains within the school, from serving as secretaries on staff meetings, to committee heads on sport, to curriculum developers when teachers work collegially to designing learning programmes for learners. A further detailed explication of these roles, zones and committee types follows within this review.

On the other hand, Gronn (2000) identifies a number of dualisms such as leadership-followership, structure-culture, individualism-collectivism, focused or distributed, in order to highlight that organisation best succeed when the line between each is blurred. This implies a move towards collaboration and is aptly captured by Gronn (2000, p. 332) in the argument that "the more obvious instances are the typical kinds of collaborative decision-making forums common to most educational settings such as teams and committees". At different points in the lives of these forums, different members will exert different kinds of influence, and this perhaps adds to the non-static, fluid and flexible nature of an organisation that embraces distributed leadership, Gronn (ibid) is adamant that the 'conjoint' work carried out by a number of individuals is always more than the aggregated efforts of the individuals enacting their own particular roles. Distribution, according to Gronn (ibid) entails maximizing sources of information, data and judgement, and spreading the detrimental impact of the consequences of miscalculation and risk. I would argue that this is particularly useful given the complexity and range of challenges any school on any given day has to face: learners' needs, parents' demands and expectations, department requirements, and staff attention. My recent experience as leader on a particular interpretation of a single Provincial Circular on learner promotion and progress, for example, points to the need to have shared accountability among all stakeholders, including district officials. Had it not been for all levels of the system jointly accepting incorrect application of the promotion requirements, the volatility within schools in the entire province, the lack of trust learners would have placed in school based promotion processes, would forever have been challenged and its credibility irreversibly tarnished.

The pertinent question when examining distributed leadership are the concepts of *power* and *agency*: I therefore consider the following questions as key to power dynamics in schools:

1. Which individual or group gives up power?
2. Who are the recipients of this power?
3. What is the intended purpose of the surrendering of power?

Gunter (2005, p. 41) examines power in detail within schools. She states that power “is formally located in the position of being a teacher..... and it is in doings of teacherly activity and actions that power is exercised”. Gunter (2005) identifies various localities of this power; some of it is clearly taking place within structures within and beyond the school context, such as district curriculum committees, or community organisations such as civic structures on which teachers serve. Decisions about teachers’ work is not made only at school level between and for learners, but is complicated by technocrats and bureaucrats at local school, governing body level, regional and particularly at national level. It is these additional layers of decision-making that adds to the power and agency concepts found in education. The author is adamant that we have to move beyond the simple dualism of powerful and powerless if we want to truly understand teacher leadership within schools. Here Heywood (2000) is cited in the understanding of power and, in particular, the argument that ‘power has different faces’ such as power as decision-making wherein issues such as influence, deal-making, loyalty and commitment are pivotal in the transactional process. Secondly, there is power as non-decision-making such as the prevention of proposals from being aired. Finally, power as thought -control incorporates shaping thoughts, needs and wants of others.

In my view, teacher leaders would challenge such power definitions by virtue of having their individual perspectives of the concept itself, and this requires the careful management of either cooperation, or conflict in schools. Dowding (1996) is rather scientific in the description of the two concepts of cooperation or conflict and states that power to do something assumes that there is cooperation, whereas power over impacts on one’s choice and means that conflict could be generated. Heywood (2000, p. 15), cited in Gunter (2000) elaborates that power is therefore about influence, and is tied up with other practices such as *authority*, *legitimacy*, *accountability* and *responsibility*, and states that “whereas power is the ability to influence the behaviour of other, authority is the right to do so”. In formal organisations such as schools, the concept of authority is evident in hierarchy, job descriptions and different salary scales, termed *de jure* authority. Such authority is found in examples such as the legal position, and hence authority, given to principal or head of

department who may command authority by virtue of their formal positions. Similarly, one speaks of *de facto* authority, authority given to those by virtue of the specialist skills, knowledge and expertise they have. Hence the exercise of power, according to Gunter (2005), is legitimate because of claims to authority afforded to those that lead, and teacher leaders in particular would fall into the *de facto* category.

Leadership as opportunistically linked by other scholars to authority, power, influence, persuasion, manipulation and coercion is examined by Gunter (2005). Gronn (2003a) is quoted as the scholar that demands that we conveniently, and in a disguised, palatable manner, view these concepts as meaning exactly the same as leadership, and suggests that if we mean that others influence or manipulate situations for example, then we should not claim that this is leadership. I agree with Gronn (2003a) the analysis of the concepts, and by way of example, an individual may be a good manipulator of time or resources (both physical and human), but may not necessarily be a good leader within a school.

Post 1990 era, as argued by Gunter (2005 p.45), is a time “where there is paradoxically enduring support for strong leadership but also a commitment to democratic ideals”. Such juxtaposition is necessary in a new democracy such as that of South Africa as it allows for people to take up individual teacher leadership roles, whilst at the same time working collaboratively with others in a distributed and democratic environment. In fact the two are not mutually exclusive or diametrically opposed, but rather could be used to improve the practice of shared decision-making, both ends of the continuum advancing the same vision: school improvement. In addressing distributive leadership Gunter (2005, p. 49) cites Jackson (2003) and states that

professional learning communities are distributed leadership communities. When community, cooperation and collaborative learning are the prevailing metaphors driving our schools, rather than hierarchy, competition and accountability, then it will follow that issues of *voice, participation, ownership* and *active democracy* will be precursors of new leadership patterns, and this is a hard road to travel. It is one of the journeys against the grain.

The latter part of the call for distributed leadership, and thus a restructuring and new culture within school, is emphasised by Gunter (2005, p. 50) by stating that “a redesign of schools needs distributed leadership to deliver redesigning; and second, the development of

distributed leadership is dependent on strong headship leadership”. Naturally, as claimed by Barth (1988) earlier, all teachers are able to lead, but more importantly, it is principals as chief learning officers (Ash and Persall, 2000) that could either promote or hinder teacher leadership. However, Gunter (2005, p.50) does warn that “teachers are overworked...hence distributing work is not necessarily the answer...grafting distributed leadership onto educational organisations that are unitary and hierarchical means that those accountable may find it too risky to engage in distributed leadership”.

This is an invaluable point in that an oversimplification or an extreme optimistic view of distributed leadership could further overburden teachers, and what it required is to consider concepts such as *authorised*, *dispersed* and *democratic* forms of distributed leadership. This implies that we have to look beyond the functions, tasks, knowledge and skills of leaders, teacher leaders especially, but towards the location and exercise of power, including authority, responsibility and legitimacy (Gunter, 2005). Distributed leadership as *authorised* is where work is distributed from the head teacher to others, and its’ success is dependent on the legitimacy of the head teacher, much like the *de jure* concept earlier defined. This is made practical through delegation of duties to subordinates, resulting in such subordinates achieving a certain level of status, should they complete the task as expected, and this is generally a top-down process. However, should tasks be delegated to teacher leaders by authority, they in turn, through the acquisition of legitimacy and power, may in turn ‘re-delegate’ to others in order to achieve maximum results. It is precisely this aspect of teacher leadership that my research intends to understand by examining both the roles and functions of teacher leaders, as well as the deep nature of how they go about practising their leadership within and beyond the school. Delegation is the ‘influencing’ of subordinates to carry out tasks that serve both to advance the interest of the organisation, as well as for the empowerment of the individual.

On the other hand, distributed leadership as *dispersed* is where much of the work goes on without and formal working in the hierarchy, meaning that there could be a “leaderful team...which leaves achieving outcomes to others” (Lingard et al. 2003, p. 54). The distribution is accepted through the legitimacy of differentiated knowledge and skills of those who do the work, again, much like the *de facto* concept defined earlier. This is more bottom-up through networks in which the private interests of the individual are promoted through group and collective actions. Although the aspirations of the individual are emphasised by Gunter (2005) in dispersed leadership, it would be dangerous to unquestioningly accept such

a claim from teachers as it could drive too many disconnected agendas and programmes within the same school, resulting in an undesirable, heavily contested terrain. What remains crucial are the reasons why teachers work together, and Gronn (2002, p.249) has theorised this as “concertive action which is more than a numerical aggregation of ‘many hands make light work’, and instead conceptualises distribution around spontaneity, intuitive understanding and the existence of a variety of structural relations”. Spillane (2003, p.535) refers to a form of parallel leadership, one where others in addition to the head teacher lead, a concept of “stretched over the school’s social and situational concepts”. Working together over time means teachers get to know, rely on and trust each other, and this partnership building forms co-leadership within schools. Gronn (2002, p.431) has termed this “conjoint agency which means agents synchronise their actions by having regard to their own plans, those of their peers, and their sense of unit membership”. There would therefore be an overlap or complement of responsibilities from time to time, thus the need to understand both interdependence and coordination. In this regard, the argument is raised by Woods (2004, p.8) and is important when stated that “although leadership may be distributed, it does not necessarily imply the absence of hierarchy”. The coordination and interdependence needs to be skilfully driven by the principal, and perhaps more importantly by teacher leaders themselves in order to achieve the desired namely school improvement.

Whilst Woods (2004) advocates for both distributed and democratic leadership, the emphasis on democratic leadership is clearly favoured. For example, it is claimed that while both are emergent and reveal dispersal of influence, it is democratic leadership that acknowledges formal leaders as well as leadership. Secondly, while both are inclusive, it is democratic leadership that has open boundaries, so involvement in decision-making is based on wider recognition of members of the staff to make contribution and to lead programs. Thirdly, while both recognise position, it is democratic leadership that values dissent, whereas distribution assumes political neutrality. Perhaps the ideal then could be a combination of the two concepts to form *democratic distributed leadership*, premised on the values of democracy such as inclusiveness and freedom, while advancing the empowering, agency-filled notion of distribution.

“Distributed leadership means more than shared leadership”, according to Spillane (2006, p.3). Though the leader-plus concept is important, it is not enough to capture the complexity of the practice of leadership from a distributive perspective, it is the collective interactions among leaders, followers and situations that are paramount. What a leader does, through

interaction with others, influences and in turn is influenced by other leaders. Leadership practice is thus a system of interacting practices and is more than the sum of the actions of individual leaders. Contingency theorists like Fiedler (1973) and Murphy (1991) argue that aspects of the school situation influence what leaders do, and such external 'elements' such as school size, shape what the leader does from the outside in. Spillane (2006) argues that distributive leadership views the situation in interaction with leaders and followers, and defines leadership practice itself.

I now turn my attention to what the literature views as possible barriers or enhancing factors to teacher leadership.

2.10 BARRIERS AND BENEFITS, ZONES AND ROLES OF TEACHER LEADERSHIP

While research points to the overall benefits derived from distributed leadership, teacher leadership in particular with reference to collegiality, Harris (2004, p.19) correctly states that "it would be naïve to ignore the major structural, cultural and micro-political barriers operating in schools that make distributed forms of leadership difficult to implement". The reason for such difficulty include the fact that distributed leadership requires those in formal leadership positions to relinquish power to others, and this could at an primary level challenge both authority and ego, whilst placing the principal for example in a vulnerable position due to a direct lack of control, at a secondary level. The innovative stance proposed by Harris (2004) whereby principals could use alternative ways to remunerate staff who take on leadership responsibilities, is a matter more easily recommended in developing countries, than it would be in South Africa. Current South African legislation (South African Schools Act, 84 of 1996) does not permit such practice, but alternative incentives could be employed such as certificates and awards, negotiated 'time-off', and perhaps a reduction in classroom-based workload such as removing the teacher as a form teacher where massive administrative loads are the norm.

Secondly, the top-down approaches to leadership and the internal school structures offer significant impediments to the development of distributed leadership, according to Harris (2004). Hierarchy, the separate pastoral and academic structures in schools, the subject or department divisions, all form to present significant barriers to teachers working together. What is important is that distributed leadership not to be implemented as misguided

delegation, delegation by authority of menial and disempowering tasks, delegation that aims simply to lighten the workload of those in formal positions. This possibility is captured by Singh (2007, p. 67) wherein the claim is made by teachers that the school SMT were simply passing on their standard job descriptions disguised as teacher involvement to create the appearance of teacher leadership, hence the expression by a teacher in the study that “sometimes you feel its management’s job just passed onto you. I won’t consider that as leadership. It is just passing the buck”.

Time could serve as another impediment to teacher leadership. Harris (2004) cites a study by Ovando (1996) wherein it was found that time to meet was a central component of success, and in schools that were improving, schools were given dedicated time to collaborate with one another. Of importance here is the leadership of the principal, one who trusts that such dedicated time is not viewed sceptically or suspiciously, but is genuine in its request by teachers for collaboration.

Within the South African context, Grant (2006) identifies at least three prerequisites for teacher leadership which could serve to mitigate the barriers to teacher leadership. These include firstly a collaborative culture with participatory decision-making and vision-sharing. Secondly, is the establishment of a set of values which could assist to develop this collaborative culture Finally, she states that distributive leadership on the part of the principal and formal management is crucial.

Furthermore, Grant (2006) states that the view that only those in formal management positions should lead creates another barrier in that the school, management team hoard too much work, creating overload as they are threatened by the initiative and innovation of their colleagues to lead. The teachers become too afraid to challenge management and, in a similar manner, Muijs and Harris (2003) argue that this ‘top-down’ structure serves as an important teacher leadership.

Teachers themselves, who are resistant to change, allowing the traditional, steep hierarchical management structure to persist in post-1994 South Africa, also serve as barriers to teacher leadership. The follow-and-obey paradigm has to be sharply shifted towards one that encourages the voice and agency of modern teachers in South African schools to take up their rightful places within the democratic environment.

Teachers too do not have the confidence at times to take up new roles within their schools, yet another barrier. One only gains experience by actually doing the work, therefore principals must ensure that space is granted for initiative, as well as a reasonable amount of risk-taking by teachers, whereas such teachers succeed, then they should be rewarded, perhaps not in monetary terms, but by public announcements, in staff rooms and local media, for example.

2.11 CONCLUSION

Teacher leadership is a relatively new concept in South Africa, but has been well researched, documented and implemented in other countries such as the USA, Canada and the UK. What is required is continued academic investigation into teacher leadership at the local level, as the South African context, both historically, and economically, differs markedly with that of the developed world. Whilst various aspects of the international literature such as the definition and characteristics of distributed leadership, and teacher leadership in particular may apply, what is still required is a domestic advocacy that continues to claim as stated by Barth (1988): that all teachers can lead given the opportunity.

Optimism apart, Harris (2004) maintains, as mentioned earlier, that it would be naïve to ignore the major structural cultural and micro-political barriers operating in schools that could make distributed forms of leadership difficult to implement.

In the ensuing Chapter 3 entitled *Research design and Methodology*, I present the methods and methodology that underpinned my case study. I also examine matters relating to sampling, ethics and the limitations of the study.

CHAPTER THREE

RESEARCH DESIGN AND METHODOLOGY

*It wasn't curiosity that killed the cat
It was trying to make sense of all the data curiosity generated.*
Halcolm (cited in Patton, 2001, p.440)

*Not everything that can be counted counts, and not everything that counts
can be counted.*
Einstein (cited in Patton, 2002, p.12)

3.1 INTRODUCTION

This chapter is premised on the principle that methodology and method in educational research are two clearly discernable, though inter-related concepts. Cohen, Manion and Morrison (2001) distinguish between methods and methodology. 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, Manion and Morrison 2007, p.47). According to Kaplan (1973), methodology is a description and analysis of methods chosen, of their limitations and resources, of clarifying their presuppositions and consequences.

In comparison, ‘method’ refers to the change of approaches and techniques used to gather data to be the basis for description, inference, interpretation, explanation and prediction. For the purposes of my research, methodology refers to the broad approach to the study and in this instance was a case study of teacher leadership in a semi-urban primary school. The methods are the instruments I used to gather data that included questionnaires, a focus group interview, semi-structured individual interviews, observation and personal journals kept by each of the three primary respondents.

This chapter consists of three main sections. Section A elaborates the methodology of the study and Section B the methods and instruments used in this project. Section C deals with the analysis of the data collected as well as an explication of how this data is to be presented in the forthcoming chapter that deals with the actual findings of the study. Section A comprises of the research aim and questions, the chosen paradigm and a brief context of the study. Section B deals with the methods used to collect and interpret data. Section C explicates data analysis, issues of ethics, validity and reliability and finally the limitations of the study.

3.2 AIM AND RESEARCH QUESTIONS

The aim of this study was chiefly to describe how teacher leadership is enacted in a semi-urban primary school in KwaZulu-Natal, and to determine what factors, if any, promoted or stifled teacher leadership. Teacher leadership, as an emergent trend, is premised on distributed leadership theory. As my study is located within the South African education landscape, the limited survey style and small qualitative studies undertaken by researchers points, Grant (2008) argues, to the need to conduct more case-oriented, qualitative studies on teacher leadership, hence this particular study. The facts that emerged from the Grant (2008) study clearly emphasise that teachers support the notion of shared leadership, that they felt equipped to lead largely within the school and not beyond. My study attempted to describe the enactment of teacher leadership in the case study school, leadership between schools, within the community and as far as Circuit and District Office as well. Teachers that take on leadership roles do so with the view that schools adopt and adapt to change, and the ultimate goal is school improvement. These teacher leaders have the abundance of abilities to take on risk, to be agents of collaborative learning. Furthermore, their peers trust their expertise, and that where there is a supportive culture from formal positions such as the SMT exists, teacher leadership thrives.

My study set out to answer the following research questions:

- How is teacher leadership enacted in a semi-urban primary school in Kwazulu-Natal?
- What factors promote or hinder this enactment?

In response to the research questions above, the main aim was to view teacher leadership in action in the primary school I used in my research. This was made possible by carefully sampling firstly a school that showed characteristics of distributed leadership, and then secondly selecting three active teachers who led within and beyond their classrooms. My research was therefore not to ‘test’ the hypothesis that teacher leadership leads to school improvement, although Flyvbjerg (2004) argues that this could be done. Instead, I set out to identify how teacher leadership happened in the school, described the areas in which teachers led, and aimed to capture the deep meanings behind the choices they make to lead in their schools, and to finally describe the factors that promoted or hindered such leadership.

3.3 CONTEXT OF THE STUDY

3.3.1 A portrait of the school

This study was undertaken in a semi-urban primary school in the Kokstad Education District, KwaZulu-Natal that offers Grade R to Grade 7. The school is an ex House of Representatives school. The school, with its well-maintained buildings and sports facilities, stands in stark contrast to the low-cost housing development in the area, separated only by a narrow community road. The high rate of unemployment, as well as the poorly educated parent community, appears not to have deterred the school from being highly successful, both academically and in extra-curricular matters. This is evidenced in the pride of the school clearly demonstrated in the display of innumerable trophies and shields, certificates and general sponsorship acknowledgments in the foyer within the administration block.

The school has a staff complement of 39 educators, 11 male and 28 female, and a learner enrolment of 1231. There are 29 permanent, six temporary and four Governing Body-employed teachers. The SMT is comprised of one principal, two Deputy Principals and four HOD's. The school is dual medium, offering classes in both English and Afrikaans, with IsiZulu taken as the first additional language. Besides the standard learning area offerings of the National Curriculum Statement (NCS), the school offers music and drama and computer studies as formal subjects. The overall pass-rate over the last three years has been highly commendable, with 89% in 2006, 90% in 2007 and 94% in 2008.

The school has recently completed the construction of a sports pavilion, which has a large football field, netball pitch, cricket patch, and an athletics track. The tireless fundraising initiatives and strong parent-business ties have secured these well-earned facilities, with teachers predominantly spearheading such developments. There is a minimal learner dropout of about 1% per annum, largely due to the availability of sound educational practice, excellent sporting facilities and reasonable school fees at R600 per annum. The school adopts a contemporary business-like approach to its teaching, with careful attention paid to time-on-task, clearly defined roles and responsibilities, and a high degree of collegiality.

3.3.2 Access to the school: Navigating the bureaucracy

I viewed the access to the school in my study as a negotiated agreement and not a right. This is emphasised by Cohen *et al.* (2007, p.55) who state that “investigators cannot expect access to a ...school... as a right... they have to demonstrate that they are worthy of being accorded the facilities needed to carry out their investigations”. Achieving goodwill and cooperation were key in my access as my research was to be conducted over a reasonable period, commencing in September 2008 and concluding in March 2009. At the same time I avoided disturbance to the education programme of the school by interviewing outside teaching hours, and negotiated with the principal on obtaining copies of documents for analysis during weekends.

In all organisations, access to respondents has to be formally communicated, and in research this is particularly important as it links with good ethical practice. I wrote formally to a number of affected persons in my project for their informed consent, including the principal (Appendix 9), the entire staff (Appendix 10), as well as the respondents, the three teacher leaders themselves (Appendix 11), seeking their informed consent. Although the principal and respondents agreed to be part of the project, I must emphasise that they were not ‘queuing up’, eagerly waiting to be interviewed or given journals to complete. Access to the school was not difficult in that the principal himself has recently completed his Master’s Degree, at the same institution in which I was registered, and showed a great deal of empathy from the beginning. I arranged the first session telephonically to address both the principal and the entire staff on the purpose of my project, and was given ten minutes during one of the regular staff briefings in the afternoon to present my plan. I also explained that all teachers including the SMT were invited to complete a survey-style questionnaire on teacher leadership.

3.4 Sampling

The sampling of the primary school as well as the respondents for my project was informed by the purposive preference to qualitative research as advocated by Stake (2005, p.451):

For qualitative fieldwork, we draw a purposive sample, building in variety and acknowledging opportunities for intensive study...we recognise a large population of hypothetical cases and a small

subpopulation of *accessible* cases...on representational grounds, the epistemological opportunity seems small, but we are optimistic that we can learn some important things from almost any case...my choice would be to choose that case from which we feel we can learn the most.

I chose the purposive sampling method because I wanted to include a school, as well as teacher leaders, who were willing and able to participate in the research study. The choice of the primary school in the Kokstad District was convenient on the basis that there was consistent claim from many quarters that the school was highly democratic, effective and successful. Teachers frequently appeared in local print media spearheading large-scale innovations in the school such as infrastructure developments, links with higher education institutions and academic tutorship, as well as accolades for sport, culture and teacher awards. This made the school a perfect sample in line with the observation schedules of Harris and Lambert (2003) (Appendix 4), and that of Grant (2008) (Appendix 5), on zones and roles of teacher leadership. This purposive school sample then was in line with the recommendation by Stake (2005) in that the researcher should choose that case from which one could learn the most.

I consciously opted not to conduct the research in my own school for fear that teachers would give responses hoping to please me as their principal and thus not render a true collection of data. Secondly, my position as principal would have compromised the integrity of the research as I have a birds-eye view on teacher leaders in my own institution, and my own subjectivity would have served as a barrier to the study. I doubted whether teacher leaders in my own school would have separated the two positions I held, that is one of principal and at the same time researcher. However, this is not to assume that respondents from the neighbouring school were not aware that I was a principal, in fact I had to frequently remind them at staff briefings that my purpose was chiefly to obtain data for academic purposes.

On the other hand, working away from my own school had its limitations in that I could not readily attest to the accuracy of interpretations given by the respondents. I relied heavily on their claims, as well as on the wide range of instruments such as journals, school observation schedules, and interviews in the data collection. The second step of the sampling phase involved the careful selection of three teachers as participants in my study. As a researcher within a larger group of eleven, the number of respondents was a pre-determined feature of the entire group project, and I was therefore limited to sampling three post level one teacher

leaders by consensus. This was not an easy task firstly because I was not a staff member and had no direct knowledge of the most active teacher leaders in the school. Secondly, it appeared that teacher leaders constituted the entire staff in some facets of the school, education department or community. The large staff of 32 post level one educators posed a challenge in terms of selecting the most appropriate respondents. At the same time, I could not use random sampling as it was not part of my research plan, neither was I guaranteed that this randomisation would result in the desired respondent. I approached the school principal and requested him to ‘recommend’ three of teacher leaders, to which he complied. This sample of post level one teacher leaders comprised a female and two males, a heterogeneous group of talent, experience and vision for the school. This sampling strategy could be viewed as resulting in “theoretical sampling and sampling adequacy” (Morse *et al* 2002, p.12) where the research participants have knowledge, experience and perceptions of the research topic, in this case teacher leadership. It is a strategy for working with rigour (Ibid).

3.5 METHODOLOGY

3.5.1 The qualitative approach

There are three broad approaches to educational research. The first is based on the scientific paradigm and rests upon the creation of theoretical frameworks that can be tested by experimentation, replication and refinement. This is referred to as the quantitative approach and is framed in the positivistic paradigm. The second approach seeks to understand and interpret the world in terms of its actors and consequently may be described as interpretive and subjective. A third approach that takes into account the political and ideological contexts of much educational research is that of critical educational research. Aspects of interpretive research informed my research.

Consistent with the notion of “fitness for purpose” (Cohen, Manion and Morrison, 2007, p.78), the design and methodology of this research was largely decided by its broader purpose. Since my intention was to explore *how* teacher leadership is enacted in schools, as well to attempt to understand *why* teachers take on leadership roles, I felt that the conventional positivistic or quantitative approach would give a rather skewed and one-dimensional view of the complexity and multi-dimensionality of teachers’ leadership decision-making realities. What was of particular concern about the positivistic tradition was its’ mechanistic and reductionist view of reality, its disregard for the forces of choice,

intention, freedom of individuality, and its discounting of man's ability to interpret and represent his or her experiences (Denzin and Lincoln, 2000; Silverman, 2001).

My research is cast in a qualitative-interpretive frame, akin to the perspectives of Bascia and Hargreaves (2000) who assert that the best way to investigate the subjective experiences and thinking of teachers is through an in-depth, contextually based interpretive design. In the light of my broader interest in *how* and *why* teachers take on leadership roles in schools, as well as to understand the possible *barriers* or *opportunities* to lead within schools, I was drawn to Guba and Lincoln's (1981, p.124) finding that "human behaviour, unlike that of physical objects, cannot be understood without reference to meanings and purposes attached by human actors to their activities".

Based on my own personal epistemological stance that there are multiple truths, that people have multiple realities that are socially constructed, and that their behaviour can only be clearly understood in the light of their contexts, I found the qualitative-interpretive design appealing for a number of reasons. This includes, among others, its ultimate goal of deepening our understanding of complex phenomena instead of making simplistic predictions or quantified measurements, its studying of respondents in their natural settings, and its ability to provide rich descriptions and explanations from the perspective of the respondents (Denzin and Lincoln, 2000). In this regard, Eisner (2000, p.67) commends the virtues of qualitative research as follows:

In education, qualitative research has a great deal to offer, provided researchers seek a more complex understanding of education. There are multiple ways in which the world can be known, which is particularly relevant, since qualitative researchers pay attention to the nuanced quality of the particular, and not the general. Through the nuances and subtleties, qualitative researchers draw the attention to particulars and in so doing they slow down the predisposed human perceptions, and invite human exploration.

Qualitative research design seemed the most reasonable to use in my study on a pragmatic level, due to its inherent flexibility and malleability. My own experiences as a principal of a complex Combined School meant that I was familiar with the unpredictability, fluidity and sheer complexity of everyday leadership, and acknowledged that I could not enter the school

I chose to conduct my research in with a rigid and unalterable blueprint, seeking to ‘quantify’ teacher leadership. Equally, it is the ten years of leadership I have in a formal position in my school that granted me the opportunity to develop invaluable skills and attitudes in negotiating access into the understanding of how and why teachers seek to lead in schools. According to Merriam (1998), these personal skills referred to include tolerance for ambiguity, sensitivity, empathy, and the ability to communicate and listen effectively, all indispensable qualities in qualitative research. This in no way permits me to make unjustifiable claims of being anywhere close to being a seasoned researcher, except that I was consciously aware of such elements whilst conducting research.

Qualitative research is inherently “multi-method in focus... Accordingly, qualitative researchers deploy a wide range of interconnected methods, hoping always to get a better fix on the subject matter” (Denzin and Lincoln, 1994, p.2). As previously alluded to by Cohen *et al.* (2007), methods here refers to techniques for the collection of data, and these methods are later detailed within this study. The qualitative methodology employed in this study necessitated the use of various methods such as the administration of questionnaires, journal writing, and interviews of the teacher leaders, all in an attempt to gain a deep, rich understanding of teacher leadership.

Schools as educational institutions and the individuals, including *teacher leaders*, who lead in and beyond the school, are a heterogeneous group of beings having different human attributes, abilities, aptitudes, ideologies, values and experiences. I therefore required a methodology that would be able to capture this heterogeneity from each teacher leader’s perspective, and qualitative methodology, according to Bogdan and Biklen (1982) was apposite since it enables the researcher to consider experiences from the informants’ perspectives. I hold the position that qualitative research methodology is capable of accommodating and accounting for the myriad of differences and complexities, the heterogeneity, that are involved in social settings such as schools (Bassey, 1999). The comprehensive and succinct definition of qualitative research provided by Denzin and Lincoln (2000, p.3) summarises the reason underpinning my choice of this research methodology:

Qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations...qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret phenomena in terms of the meanings people bring to them.

Qualitative research has four broad characteristics as argued by Bryman (1988). Firstly he argues that it is essentially concerned with looking at events, *processes*, *values* and *actions* from the perspective of those being studied. This was a cornerstone of my research as I intended viewing teacher leadership in action, a complex process that required a myriad of methods such as observation, and interviewing. Secondly, Bryman (1988) continues that it is concerned with describing and analysing the social settings in which those being studied are located as a means of holistically contextualising research results. These relate to the context of the school, classroom and community as well as the sampling of my respondents were informed by the observation schedule of Harris and Lambert (2003), (Appendix 4), all helped frame the context of my study.

Thirdly, qualitative research according to Bryman (1988) involves the spending of enough time in settings in order to gain insights into social events and processes: I visited the school on a minimum of five occasions in the research period, and spent an average of two hours per session carefully making field notes on the delicate cultural nuances within the school, always eager to observe the teacher leaders in action in various practical roles they assumed.

Bryman's (1988) final characteristic of qualitative research is the favouring of a relatively open-ended and less structured research strategy which allows for adjustment as the research field demands. Although I had a predetermined observation schedule and survey-style questionnaire for the description of the school, I soon found the schedule limiting as it offered only technical statistical information. I thus adjusted my observation and requested a brief interview with the principal on the day of the observation, and was pleased with the positive response from him. The information gathered from him was a cogent analysis and interpretation of the history and culture of the school, the observation schedule itself might never have revealed. These multifarious approaches are the hallmark of good quality

qualitative research, and coupled with the degree of flexibility, lent credence to issues of reliability and validity in my research.

According to the interpretive paradigm, the scientific method of studying the social world is partial, because human activity involves beliefs, values, intentions and goals which give activities meaning. An interpretive approach thus “looks for culturally derived and historically situated interpretations of the social life-world” (Crotty, 1998, p. 67). This approach rests on the premise that “knowledge is constructed not only by observable phenomena, but also by descriptions of people’s imitations, beliefs, values and reasons, meaning-making and self understanding” (Henning *et. al*, 2004, p. 20). Much of the knowledge of the participants on their leadership role thus differed according to their own interpretation of the needs and culture of the school I conducted my research in. Their individual values and cultures brought different though not necessarily dialectical points of view on the need for teacher leadership, a point potently made by Henning *et. al* (ibid).

3.5.2 Case study research

My research is a case study of three teacher leaders in action within and beyond the school. Yin (1993, p. 13) defines a case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident”. Teacher leadership is a contemporary phenomenon within the broad international theory of leadership in general, and it is particularly viewed as emergent within the South African context. In this regard it suffices to add that, although scholars in the discipline of education have researched the phenomenon in South Africa, it still remains largely under-researched (Grant, 2008). Whilst previous studies were predominantly large-scale surveys to explore the perceptions teachers have on teacher leadership, I have undertaken to conduct a deeper, more interpretive qualitative study on the concept of teacher leadership.

Case study research is further defined by Yin (1994, p. 13) who states that:

the case study inquiry copes with the technically distinctive situation in which there will be many more variables of interest than the data points, ... and relies on multiple sources of evidence, with data needing to converge in a triangulation fashion, ...benefits from the prior development of theoretical propositions to guide data collection and analysis.

I concur with the definition offered by Yin (1994) in that the school as the case of my research seemed to offer many more variables of interest on my very first arrival. There were matters relating to recent large-scale infrastructural developments, display cabinets overflowing with trophies and memorabilia, large advertising boards that pointed to collaboration with the private sector, as well as with other off-campus University satellites, all of which whilst interesting, fell out of the boundary of my case to be researched. The temptation to the novice researcher to gather data outside one's framework of investigation should be avoided at all costs, and it was precisely the observational framework on teacher leadership by Harris and Lambert (2003) as well as the 'prior development of theoretical propositions' by Grant (2008) that honed my focus on the case in question.

Defining the case itself initially presented a number of challenges and the dichotomy was to establish whether the *school* or the *teacher leaders* themselves were the case of inquiry. Anderson *et al* (1998, p.153), state that "one difficulty in case study research is actually defining the case...in any case study, the researcher should have a clear vision of what the case is and what the unit of analysis will be examined". For the purpose of my research, the school as described in the 'context' section is the case, whilst the three teacher leaders are classified as the units of analysis. As will be described in more detail to follow, I administered a survey questionnaire and also used a school observation schedule to gain an initial generic understanding of the 'case', in this instance, the school. More detailed methods such as individual journal entries for each teacher, interviews and observations in practice were employed in the attempt to gain a rich, descriptive interpretation of the units of analysis.

The purpose behind choosing case study research is that it is firstly *particularistic* and secondly that it is *descriptive* in nature (Merriam, 1998, pp. 29-30). The primary school as the case of my inquiry was indeed a unique, peculiar school in that it demonstrated clear signs of large-scale teacher leadership through the successes it had achieved over the years. These successes were largely in the domain of public discourse, both from Department Officials pronouncements, as well as the confidence parents showed in the democratisation of the school. Here I refer to the powerful, representative governance structure, the academic achievements in the form of educator qualification improvement, as well as the prowess the school enjoys in sport and cultural events, all of which were regularly captured in local media. I sought to then conduct my research in the school in order to portray "what it is like" to be in the particular situation, to catch a close-up reality and offer a "thick description"

(Geertz, 1973) of the participants lived experiences of, thoughts about and feelings on teacher leadership. I attempted to intensively investigate in an in-depth manner, the interdependencies of parts and patterns of teacher leadership within the school (Cohen *et al.* 2007).

This could only have been achieved by acknowledging that the capture of such rich data is both time and context bound. The attention to issues such as value, interpretation and perception cannot be found in the positivist approach where influences of context are scientifically separated out and controlled. The researcher becomes part of the case and, as stated by Bassey (1999), the case study achieves greatness, when through the portrayal of a single instance locked in time and circumstance, the researcher is able to communicate enduring truths about the human condition.

Case study invokes within the researcher an academic responsibility to practice *reflexivity*, and in so doing, creates the platform for the researcher to develop his skills in accurately representing his findings. The main purpose behind such a postulate is that the recipients and other scholars, perhaps even the respondents themselves can at a later stage, re-experience' their contribution to the study. This is referred to by Stake (2005, p. 450) as the ability "to describe the case in sufficient descriptive narrative so that readers can experience these happenings *vicariously...*".

Although this seems to suggest matters relating to validity and reliability of the study, it was for me rather the most apt depiction of the case in its natural context, which seemed a priority whilst conducting the fieldwork. On the other hand, reflexivity, according to Guba and Lincoln (1981), is the process of reflecting critically on the self as researcher, the human as instrument, the conscious experiencing of oneself both as inquirer and respondent. Reinharz (1997, p.3) argues that we not only "*bring* the self to the field...we also *create* the self in the field". This was a clear reminder of the need to be acutely aware of one's subjective position within the study and the need to clarify, beforehand, issues relating to my being a researcher rather than a principal of an adjacent school. The notion of reflexivity was to me, during the research process, inextricably linked to *voice*, and this is best described by Hertz (1997, pp.11-12) as "a struggle to figure out how to present the author's self while simultaneously writing the respondent's accounts and representing their selves".

3.5.3 Descriptive and illustrative case study

Yin (2003) distinguishes between three forms of case study, namely exploratory, explanatory and descriptive. A descriptive case study presents a complete description of a phenomenon within its context. I aligned my study within the definition of descriptive case study as I wanted to fully describe teacher leadership in action within a particular context, the semi-urban primary school, my case study school. Such a description was comprised of facets of the classroom leadership, leadership within the school itself, and finally leadership within the community. Such a descriptive case study generated an understanding and illumination of teacher leadership in context as well as its relation to other similar studies conducted by my colleagues in the form of the group project, all adding to the body of somewhat limited descriptive case study in South Africa. I did not expect to generate any new theoretical insights into teacher leadership, but aimed to heuristically advance the concept of teacher leadership. I have similarly referred to my descriptive case study as an *illustrative* case study in that my aim was to present detailed information about a particular group of three teacher leaders, frequently including their lived accounts, and thus did not focus on the discovery of a universal, generalizable ‘truth’ about teacher leadership. I did not seek to look for cause-effect relationships in my study, but placed emphasis on description of the roles, and barriers or opportunities for teacher leadership.

A descriptive case study in education is one that presents a detailed account of the phenomenon under study and, according to Lijphart (1971), are classified as *atheoretical*. They are “entirely descriptive and move in a theoretical vacuum; they are neither guided by established or hypothesized generalisations nor motivated by a desire to formulate general hypotheses” (Lijphart, 1971, p.691). According to Lijphart (*ibid*), descriptive case studies are useful in presenting basic information about areas of education where little research has been conducted, and wherein innovative programmes and practices often are the focus of such studies. This is particularly relevant in my own research on teacher leadership as it remains an under-researched area in the South African context, and is equally regarded as a contemporary and innovative practice, unlike the traditional leadership of formal positions within schools. Moore (1986) conducted multifarious descriptive case studies, ultimately culminating in his devising of conceptual frameworks about particular *trends* in education, much like teacher leadership as a trend in this project.

3.5.4 Strengths and limitations of case studies

Case study research falls within the *qualitative* paradigm, and when contrasted with true experimental design, say in positivistic *quantitative* research, has both strengths and limitations. In experimental design, for example, because of the tightly controlled conditions, random sampling, and use of statistical probabilities, it is possible to predict behaviour in similar settings without actually observing that behaviour.

The case study offers a means of investigating complex social units consisting of multiple variables of potential importance in understanding the phenomenon *teacher leadership* and act to advance the field's knowledge base on the trend. However, although case research when done correctly, may produce rich, thick descriptions and analysis of a phenomenon, time and financial resources could limit the depth of the research. In this particular study, it would be inaccurate to claim that spending one hour on the school observation schedule within the school, and interviewing teacher leaders in a single forty five minute session has produced the most desirable research data. Guba and Lincoln (1981, p.377) state that "case studies can oversimplify or exaggerate a situation, leading the reader to erroneous conclusions about the actual state of affairs".

Qualitative case studies are also limited by the sensitivity and integrity of the researcher. The researcher is the primary instrument of data collection and analysis, and this could lead to a degree of data 'contamination'. This is as a result of the highly subjective nature of case study research, as well as the inexperience and 'independence' of the novice researcher like me. A further weakness of case study lies in the analysis of the data wherein the researcher could be "so select from among available data that virtually anything he wished could be illustrated" (Guba and Lincoln, 1981, p. 378). I attempted in my analysis to verify, firstly with the respondents whether the transcriptions were as accurate a reflecting of their meanings by returning to them with the final text.

Further limitations involve the issues of reliability, validity and generalizability. Hamel (1993, p.23) observes that "the case study has basically been faulted for its lack of representativeness... and its lack of rigour in the collection, construction and analysis of the empirical materials that give rise to the study. This lack of rigor is linked to the problem of bias... introduced by the subjectivity of the researcher".

3.6 METHODS OF DATA COLLECTION

Case researchers greatly rely on subjective data, such as testimony of participants and judgements of witnesses...the major questions are not questions of opinion or feeling, but of the sensory experience...and the answers come back, of course, with description and interpretation, opinion and feeling, all mixed together (Stake, 2005, p .454).

In this section, I present the data collection techniques and procedures, motivate my choice for such instruments, and briefly outline some benefits as well as limitations of each method. My *primary* sources of data were the respondents themselves, and data were obtained by means of using a focus group interview and three individual semi-structured interviews. *Secondary* sources of data are discussed later and respondents' journals, my personal journal, a school observation schedule, survey-style questionnaires and school records such as staff minutes and IQMS scores were used.

3.6.1 Questionnaires

The questionnaire I employed in my study was borrowed from previous studies. Its aim was to elicit mainly biographical data from each respondent, as well as some detail about the school itself. The second section was comprised of closed, multiple choice questions and the final section had open-ended questions. Bailey (1994) states that the structured, closed questions permit for quick coding, are direct to the point and more focused than open-ended questions, and this was precisely the aim. Where rich and free accounts of responses were sought, the open-ended questions were used. I also intended using these open-ended responses to triangulate the data provided both in the journals of the three teacher leaders, as well as the data from the interviews.

The principal of the school arranged for my briefing of the staff on the administration of questionnaires, both for the SMT and post level one educators. This briefing of the questionnaire occurred in the morning session during the staff briefing which takes place each Monday, Wednesday and Friday in the institution. I guaranteed anonymity, confidentiality and the strictest of respondent protection in their completion of the questionnaire, emphasising that its use was chiefly for academic purposes.

The purpose of the questionnaires was to develop biographical information from respondents, and to form a lucid picture of how teacher leadership was perceived, comprised and functioned in the school. The questionnaire was not my primary source of data but was used to verify statistically, the broader description of teacher leadership, the culture of the school, the possibility for the creation of space and support for teacher leadership, and the SMT management style. The SPSS (Statistical Package for the Social Sciences) was used to make various inferences from the data from the questionnaire, and is presented in the chapter on findings within this dissertation.

3.6.2 Observation schedule

I chose to observe the three teacher leaders during the fourth term of 2008, and again in the first term of 2009, in order to compare their roles within these two distinctively different school terms. I used the four fundamental categories of teacher leadership explicated in the Harris and Lambert (2003) (Appendix 4) frameworks to identify the areas of leadership within and beyond the school. These included their own development strategies, dialogue and communication efficiencies, collaboration and organisational issues for the broader school community.

It is not possible to observe everything and, as a researcher, one has to start somewhere. Several writers such as Goetz and LeCompte (1984), Bogdan and Biklen (1992) and Patton (1990) argue for a rudimentary list of things to observe and these include the physical setting, the participants in their roles, activities and interactions, content of conversations, and subtle factors. These subtle factors are what added to the heuristic, interpretive meaning within the broad qualitative study, and they included informal and unplanned activities that I witnessed, as well as non-verbal communication among and between teacher leaders and their groups they led. I took a stance of *observer as participant* technique, as advocated by Adler and Adler (1994) in that my observer activities were known to the group, and the simple trade-off was between the depth of information revealed and, the level of confidentiality I promised. This is further described as “peripheral membership role” (Adler and Adler, 1994) where the researcher observes closely enough with the members to establish an insiders’ identity without participating in those activities constituting the core of group membership.

I wanted to gain an in-depth view and understanding of how the three teacher leaders led in the fourth term as this was when examinations, IQMS and planning for the new academic

year took place. Their input in year-planner meetings, subject and grade headship, their influence on budget matters all occurred in this fourth term. The first term was used to ascertain their leadership around administrative matters relating to learner admissions, timetabling, textbook distribution and their own classroom management and leadership for the new year. I made field notes in my own journal throughout the observation process, and used this extensively to capture the richness of leadership, as well as to triangulate such observation with the data obtained from their own journals and interviews.

3.6.3 Focus group interview

I based my focus group interview on the research parameters as supplied by Powell *et al* (1996, p. 499) who define a focus group as “a group of individuals **selected** and assembled by researchers to **discuss** and comment on, from **personal experience**, the topic that is the subject of the research”.

Hence the key characteristic of my focus group interview was the *insight* and data produced by the *interaction* between the teacher leaders. Other features of the focus group included that it was an organised discussion (Kitzinger, 1994) and a collective activity (Powell *et al.* 1996) of social events (Goss and Leinbach, 1996). I was attracted to the research by Merton and Kendall (1946) wherein they state that the participants should have a specific *experience* of or opinion about the topic under investigation, that an explicit *interview guide* be used and that the *subjective* experiences of the participants are explored in relation to predetermined questions.

In relation to the above requirements, the purposive and convenient sample of the three teacher leaders was congruent with the ‘opinion’ and ‘experience’ matters as required. Furthermore, I used an interview guide (Appendix 7) that explored the basic tenets of the topic on teacher leadership within the dynamic discussion of the entire group. We also explored teacher leadership within the parameters of skills, knowledge and relationships between themselves and the SMT and other staff members. The aim of the focus group interview was to draw upon respondents’ attitudes, feelings, experiences and *reactions* within the group, in a manner that I would not have achieved in the questionnaire, journal entries or individual interviews. Some of these findings are detailed in Chapter 4 of this dissertation. I conducted the focus group interview immediately after administering the questionnaire to all 39 educators at the school, right at the beginning of the research process. This was carried out

in October 2008. I again explained the purpose of my research and emphasised the ethical issues. The focus group interview was conducted with all three teacher leaders present using a tape recorder.

The value of the focus group interview is that it elicited information that allowed me to itemise the salient issues around teacher leadership from the multiple understandings of the group (Morgan 1988). The group worked well together and trust among them was a commendable feature, and this empowered them all to contribute collaboratively (Kitzinger, 1995). The focus group interview also served as a forum for change (Race *et al* ,1994) in that I discovered post focus group session, a desire in the respondents to revisit some key areas of skills and commitment that were previously dormant in their leadership.

Some limitations experienced during the focus group interview included the domination of two respondents at the expense of the third, a matter I quickly attempted to resolve. This domination was as a result of the language of the discussion, that is English, whereas for the third participant relished in Afrikaans as a preferred language choice. It was not possible to generalise the findings of the focus group, mainly because of the small sample of the group. The participants also discussed matters not directly associated with teacher leadership from time to time, almost using the opportunity to voice out their dissatisfactions with management styles, both within and beyond the school. The focus on the topic had to be recalled frequently and this wasted valuable time. Because of the culture and context of the group, it was difficult at times to ascertain exactly what individuals were expressing. Although I expressed the need for the entire group to adhere to the ethics of the research, highlighting confidentiality and anonymity, there can be no guarantee that material shared would remain within the group.

3.6.4 Semi-structured interviews

I conducted semi-structured interviews in January 2009 with each teacher leader on different days of the study, each interview differing in terms of the questions asked. The reason for this is that each teacher leader possesses their own experience, vision and description of what it means to be a teacher leader. There were three broad fundamental questions that each were asked, and these related to their individual attributes, zones and roles wherein they led, and finally the opportunities or limitations they experienced in attempting to lead.

Each interview was then particularised, based on the responses I gathered from their journals, and deeper probing took place over a 45 minute interview session. I gathered this rich, detailed and descriptive data using a tape recorder, and requested absolute honesty and originality in their responses by guaranteeing anonymity and confidentiality. Interviews took place in each classroom of the respective teacher leader in order that they benefitted from their familiar surroundings, this after securing, in advance, an interview date with each. Interviews took place immediately after teaching on each day at 14h00.

A few limitations of the face-to-face interviews could have included my own bias in setting some of the questions, as well as attempting to elicit theoretical and strictly academic responses. Secondly, the respondents requested to quickly peruse their journal entries in order to sound correct and consistent, and I discouraged this, indicating that there is no absolute or definitive response that I was anticipating. I also found respondents speaking on the periphery of the actual topic in that they appeared to use the opportunity to voice out grievances on poor SMT management style and regularly ‘bashed’ colleagues. Perhaps it was the two extremes of questions asked, namely some requiring broad responses and others seeking greater detail. I concede that, as a novice researcher, the quality of the question is paramount in eliciting valid and trustworthy data, and this can only come with greater exposure to interviewing techniques.

3.7 DATA ANALYSIS

The multi-method approach to data collection in my project produced voluminous transcriptions based on the observation schedules, journals, focus- group and individual interviews. I adopted an *iterative, recursive* and *interactional* approach in order to analyse the data (Hatch, 2002). This implies that my data collection and analysis were done concurrently, interactively and cyclically, right from the start of the research process. With each analytical incident, emerging themes took greater significance in the subsequent data collection effort (Gay and Airasian, 2003). Smit (2001) refers to such data analysis as an ongoing and emerging process. For example, I coded the individual journal entries and, a few themes on trust, natural desire for a successful school, and leadership opportunity, formed central and emergent themes. I then explored these themes later in the individual interviews with each teacher leader.

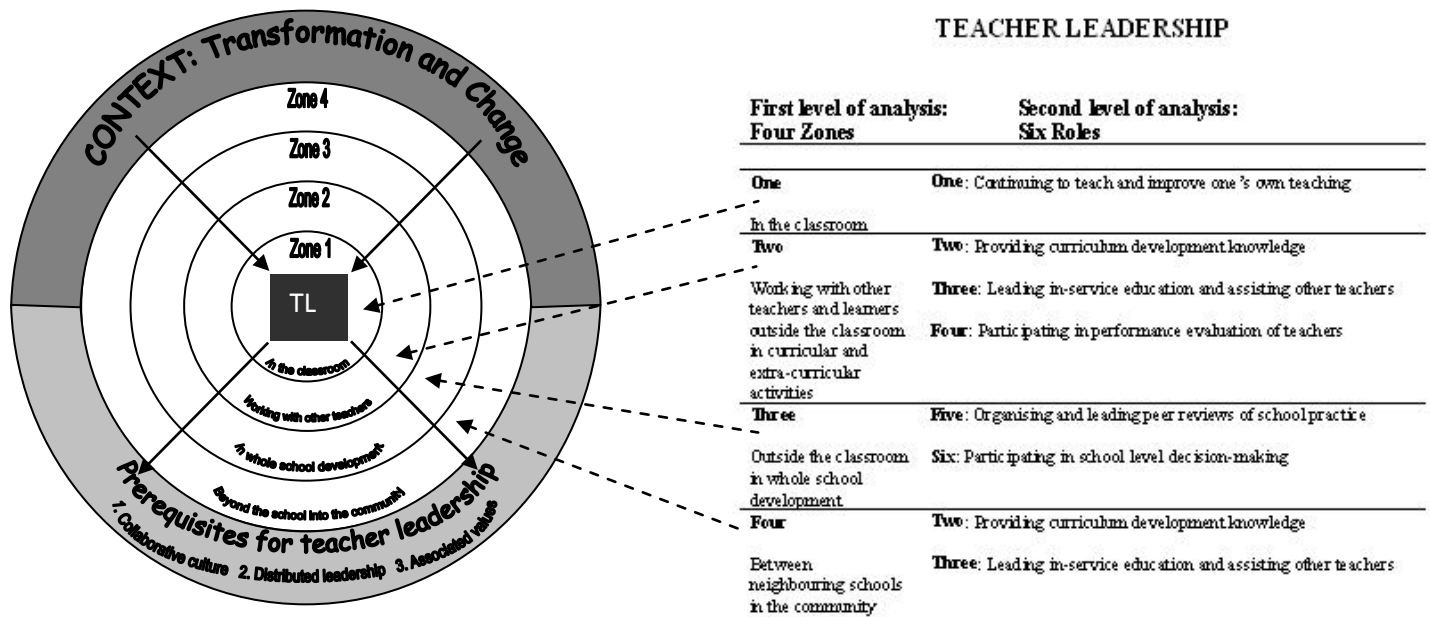
I transcribed the focus group interview as well as the semi-structured individual interviews, and used coding techniques to ascertain themes. Consistent with Patton's (2001, p.442) thinking, the latter was painstakingly born out of "intellectual discipline, analytical rigour, and a great deal of hard work". I first analysed the data from each method separately by coding, categorising and noting recurring regularities and patterns on how each teacher enacted teacher leadership, and how similar patterns of opportunity and barriers seemed common. I also analysed the copies of official school documents such as minutes of staff meetings, IQMS meetings and scores obtained by teacher leaders, as well as meetings of grade heads and acting HOD positions, wherein the teacher leaders were actively involved. Although emphasis was not deliberately placed on 'cross-case' or data comparison per teacher leader response, I did attempt to correlate the data amongst the respondents simply for the attainment of broader, overlapping themes.

The survey-style questionnaire was administered to all 39 teachers in the school, including PL1 and SMT at the outset of the study. To remind the reader, the purpose was to obtain a broad biographical and cultural perspective of the school. From seven SMT members, four questionnaires were returned, at 57% response rate, and from 32 PL1 educators, 21 questionnaires were retrieved or 65%. I considered this response above adequate and after several meetings with the staff, encouraging them to fill out the survey, I was of the view that those who did not return the survey had no interest in the project.

The data from the survey were then analysed using the SPSS (Statistical Package for the Social Sciences) in order to compile frequency tables on the following: demographics, patterns relating to grouped questions on school culture and leadership, and finally to quantify the open-ended section of the questionnaire. A detailed description of these findings is presented in Chapter 4, with clearly labelled, quantifiable results.

In order to detail teacher leadership in action, I used the model by Grant (2008) on various leadership zones and roles occupied by the three teacher leaders in my study.

I explicate some of these roles within this chapter as I elected to use the model advanced by Grant (2008) to support my argument that teachers lead in various zones and roles. The model is depicted in the figure below:



In order to present the data predominantly qualitatively, I supplemented the model above with the use of the observation schedule by Harris and Lambert (2003) (Appendix 4), during my visits to the school. These frameworks served firstly as a reference point in that they guided the characterisation of the actions I observed from the three teacher leaders with particular regard to the practice of leadership. Secondly, they served to assist in the academic identification of the categories in which teacher leaders developed themselves, the professional dialogue they engaged in, the level of decision-making and the impact they had towards overall organisational change.

I now move on to discuss various aspects relating to the validity and trustworthiness of the data I collected.

3.8 TRUSTWORTHINESS AND CRYSTALLISATION

In this section I briefly examine matters that relate to the validity, reliability and objectivity.

Credibility, according to Smit (2001), is equated with *internal validity*, whereas transferability with *external validity*. Mertens (1998, p. 181) maintains that “the credibility test asks if there is a correspondence between the way the respondents actually perceive social constructs and the way the researcher portrays their viewpoints”. Internal validity is therefore concerned with the degree of *accuracy* the researcher can gather and present his data. I attempted to establish this credibility (internal validity) in my project by a summary at the end of each interview what had been said, and checked the correctness of my understanding with that of the participants. I also cross-checked the responses from the journals and parts of the open-ended questionnaires of the respondents, with what they had said during the individual interviews. This served as some form of *triangulation* and I obtained reasonable consistency from each respondent, though not all the time. Winter (2000) states that validity in qualitative data is addressed through the honesty, depth and richness in scope of the data, and ultimately seeks to address the question: did the instrument measure what it purported to measure?

Transferability or *external validity* refers to the degree to which the results can be generalised to the wider population, cases or situations (Cohen *et al.* 2007). Lincoln and Guba (1985) suggest that, for qualitative research to be generalizable, it must offer a thick description of its context. Although I attempted to represent a thick description, generalizability was not my key focus, and this is mitigated by Lincoln and Guba (1985, p. 316) when they state that “it is not the researcher’s task to provide an index of transferability...researchers should provide sufficiently thick data for readers and researchers to determine whether transferability is possible”.

Reliability refers to the stability over time, the consistency through repetition, and the extent to which findings can be replicated or reproduced by another inquirer. One way to enhance reliability of the human instrument in qualitative research is by training and practice. I concede then, as a novice researcher, that although I did not regard my research study as indisputably reliable, the multiple methods used to gather data assisted with reliability. These included the extensive use of questionnaires, interviews, personal journals, a school observation schedule and document analysis.

On a pragmatic level, I attempted to be as objective as possible when I conducted the interviews. I was acutely aware of my own opinions on teacher leadership and my attitude towards the phenomenon, and thus allowed respondents to speak freely from their interpretation about the core characteristics of teacher leadership. Although I directed the interviews, I limited the number of leading questions on the topic of teacher leadership.

3.9 ETHICAL MATTERS

Ethical considerations for focus groups are the same as for all other methods of social research (Homan, 1991). In this regard, the journal entries, individual semi-structured interviews, data from the questionnaire and, in particular, the sensitive document copies of staff minutes, budget plan and IQMS scores were treasured with the utmost care and confidentiality. Full information about the purpose of the study, maleficence and beneficence, withdrawal of respondents at their request, were constantly emphasised throughout the project.

3.10 LIMITATIONS OF THE STUDY

I have clearly indicated in this chapter that the research project was conducted in a primary school about 45 km from mine. All the other 10 researchers in the group conducted their research within their schools, possibly granting them adequate time and opportunity to engage with their respondents, as well as easier access to documents within the school. I had to rely on the principal of the primary school to administer the questionnaires on my behalf, collect and return them. This was the first limitation in that some teachers refused to comply with the filling of the questionnaire, stating the principal might be privy to their responses.

Secondly, although I used a multi-method approach in gathering data, in an attempt at triangulation, it remained difficult for me to guarantee that what teachers said in the interviews, and claimed in their journals was accurate. I had a limited time to observe the three teacher leaders in action within their school because I could not be granted such time off from my employer.

Thirdly, the very sample of respondents as identified by the principal might not have been the best in the school to conduct research with. The lack of random sampling could have had a negative impact on the overall integrity of the study. Good qualitative research requires the

researcher to spend relative lengthy periods with respondents, and not a few hours per day as in this instance.

I did begin to notice apathy from both the principal and respondents due to my frequent visits to the school. I had to spread my access over many frequent, but shorter sessions due to travelling dynamics and time constraints. The principal, although initially agreeing to supply all documents relating to SGB, IQMS, year-planner minutes, reneged and supplied just a few. This did compromise the document analysis, but was not critical as it was secondary data.

3.11 CONCLUSION

It is my firm view that I gathered a plethora of data, richly describing how teacher leadership is enacted in a semi-urban primary school, the focus area of my study. Returning to my opening quotes from Halcolm (cited in Patton, 2001), it definitely “was not curiosity that killed the cat”, but rather attempting to make sense of all the data generated from my curiosity on the topic that was a profound learning curve.

The use of multiple methods to gather data had both positive and negative impacts on a study, but generally I would advocate a multi-method approach simply because it exposes one to the different techniques used in research. Therefore, the second quotation by Einstein (cited in Patton, 2002) that “not everything that can be counted counts, and not everything that counts can be counted” is particularly relevant in this study. There were numerous amounts of data that could not form part of the study although ‘counted’, or in this instance qualitatively recorded. At the same time, there was data that could not be ‘counted’ and this fell outside the domain of this research project.

In the next chapter I present and discuss the findings of my research.

CHAPTER FOUR

PRESENTATION AND DISCUSSION OF FINDINGS

4.1 INTRODUCTION

Teacher leadership, an emergent trend in South Africa, is a transformative process that could serve as a crucial ingredient to school and community reform. I agree with Wright (2008) when she states that the current pedagogic policy shift towards learner-centred education, driven largely by ideology, as well as the need for schools to be more self-reliant, necessitates shared leadership amongst teachers. In the South African context, Grant (2006, p.514) argues that “the only way that schools will be able to meet the challenges is to tap the potential of all staff members and allow teachers to experience a sense of ownership and inclusivity and lead aspects of the change process”.

Similar to Grant (2006), I argue in this chapter that teacher leadership should ideally run parallel to formal leadership and, for a school to be successful, teacher leadership should complement rather than compete with formal leadership. Teacher leadership is therefore a bottom-up approach that could mitigate the complex reform initiative undertaken in South Africa by serving as an expansive and viable source for engaging with education matters by critiquing policy, practice and leadership, among others.

Similar to studies on teacher leadership conducted by Singh (2007) and Ntuzela (2008), I predominantly used the Grant (2008) model of data analysis, and allowed the data to speak in a grounded and iterative manner. Accordingly, Glaser and Strauss (1967), cited in Cohen, Manion and Morrison (2007, p.491) state that such “theory generation in qualitative data can be emergent, patterns and theory are implicit, waiting to be discovered in an inductive manner”. I established the major themes from the data, and aimed to merge the data analysis with a discussion of my findings within a conceptual framework of distributed leadership defined by Gronn (2000), Gunter (2005) and Spillane (2006). I then juxtaposed this framework by adopting a more micro focus on teacher leadership as described by Muijs and Harris (2003), Katzenmeyer and Moller (2001) and Grant (2006), among other prolific writers.

This chapter presents the major themes and findings of my study which emerged from the data collected using journals, focus group interviews, semi-structured interviews as well as an observation schedule, as outlined in Chapter 3. I elected to use a postmodernist, experimental writing style in that I employed both subjectivity on the one hand, and reflexivity on the other, adopting a crystallization, rather than a triangulation approach to the interpretation of the data (Richardson, 1994).

The South African education system is faced with a myriad of complexities and challenges. These include rampant learner absenteeism, teacher apathy, infrastructural backlogs, parental detachment from learners work, perceived lack of District Office support and a constantly evolving curriculum among others. This study therefore attempted to illuminate how visionary teacher leadership, both within and beyond the school, formal and informal, could assist in addressing some of these challenges. Notwithstanding these challenges, there have been policy and legislative shifts in the post-1994 era in South Africa to address the hierarchical and autocratic order of the past.

The South African Schools Act (1996) explicitly demands a more democratic management style in schools and offers teachers multiple leadership opportunities such as membership on School Governing Bodies and serving on School Development Teams and related committees. The Norms and Standards for Educators (2000), concretizes this call for greater participation of teachers through democracy and collegiality within schools. It requires teachers to take on seven roles, among them that of leader, manager and administrator.

Although I administered and analysed the questionnaires to the entire staff of the school by using the Statistical Package for Social Sciences (SPSS), I ultimately used the data from the three respondents of my study only. I used their perceptions of teacher leadership minimally, and quantify their responses within this chapter, since I adopted a qualitative approach.

This chapter takes a peek into the lives of three teacher leaders using the lens of leadership, and distributed leadership in particular, rather than that of social justice. I begin by qualitatively sketching my case study school referred to as Teacher Leadership Primary School (TLPS) (pseudonym) in this study, followed by a profile of all three teacher leaders. Thereafter I present the themes that emerged from the data relating to teacher leadership in

action. A brief explanation of factors that promote or hinder teacher leadership is presented, and I conclude with a summary of the main findings.

To remind the reader, I reiterate my key research questions:

- How is teacher leadership enacted in a semi-urban primary school?
- What factors hinder or promote this enactment?

To recapitulate the data collection process, the table below is inserted and lends clarity to dates of collection, data collection techniques and participant codes.

The table indicates the keys to the various codes I used in this and the following chapters.

Method of data collection	Participant/s	Data collection date/s
1.School observation schedule	TL A, TL B and TL C Entire staff (briefly as not focus of my study)	22 September 2008 to 23 March 2009
2. Questionnaires	Entire school staff 4 respondents from SMT 21 respondents from level- 1 educators including TL A, TLB and TLC	15 October 2008
3. Focus Group Interview	Teacher leaders A,B and C (TL A,B,C)	23 October 2008
4. Journal entries	TL (A),TL(B) and TL(C)	October 2008- March 2009
5. Individual Interviews	TL (A) TL(B) TL (C)	26 January 2009 26 January 2009 20 February 2009
6. Documentary file	Researcher	September 2008 to March 2009
7. Field notes	Researcher	22 September 2008 to 23 March 2009

The following section represents a brief description of the school.

4.2 An institutional sketch of TLPS*

The school is situated approximately three kilometres from the centre of the town, in the heart of a residential area. The school opened its doors 25 years ago with only five teachers, but has grown to a staff of 39. It has a strong Catholic ethos with close ties to the Catholic Institute of Education (CIE), with foreign donors and religious professional support commonplace. It is regarded as a semi-urban school in that it has a quintile classification of four. The school is separated from the surrounding township by a single tarred road, is well-fenced. The school is supported by one of 12 districts within the province of KwaZulu-Natal, South Africa.

The school fees are R600 per annum with a learner population of 1231 learners, 75% black African, 23% coloured and the remainder Indian, with only a single white learner. The school begins at reception year to grade seven and has a staff establishment of 39 teachers, 28 female and 11 male. The management team of the school comprises a principal who is male, two deputy principals, one male and one female, as well as three heads of department for each phase of the school (observation schedule p.2).

No greater evidence of the success of teacher leadership could be found than in the foyer of the administration block, with innumerable sports trophies, District certificates for linguistic competitions, arts accolades for drama, and teacher awards for leading workshops (observation schedule p. 5).

The school boasts a proliferation of heterogeneous teacher leaders evident in the numerous awards displayed in the school foyer. The principal recently obtained a National Award for Excellence in management under the auspices of the National Teacher Awards, a programme aimed to encourage effective leadership in various categories. I noted with deep academic pride that the school featured prominently each week in the local print media of the Sisonke District (observation schedule p.2). They seemed to be the movers and shakers of new initiatives. They equally seemed to have an enviable balance of curriculum and extra-curriculum activities, all well planned and driven by teachers.

*TLPS pseudonym for research school

As Teacher Leader C proudly expressed in his journal:

We participate in District music, art and sport and academic competitions. In my opinion, TLPS primary do not have to shy away from any opposition on the sport fields, organising or hosting events, or even in the classroom. We have the teachers that have the ability (journal p. 6).

The effect of apartheid policies have been deeply felt by the community and this largely 'coloured' group of learners has been equally brutalised by these debilitating policies. As teacher leader B confirmed: *"I don't know why the Department has placed us in quintile four. Most of our children come from single-parent homes and alot of them are unemployed. We have to fundraise frequently to augment this shortfall"* (journal p.7).

On each of my visits to the school, it was apparent that the school has a deep sense of urgency, a business like approach to education, as not a single learner could be found ambling the terrain. There has been a very low learner drop-out rate of less than one percent per annum, and this has largely been as a result of the various curricular and co-curricular programmes of the school. It is relatively unique in that amongst many other neighbouring schools, it offers various sports codes, music and drama and computer studies. It has well maintained sports facilities including a full athletics track, and a recently completed sports pavilion. Equally, there is minimal teacher migration and the staff establishment has been very stable.

In the following section, I give a brief description of each teacher leader.

4.3 THE PROFILES OF THE TEACHER LEADERS

In this section I profile each teacher leader in order to contextualise their professional backgrounds, personalities and hint briefly at some of their leadership roles undertaken within the school.

4.3.1 Teacher Leader A: The transactional negotiator

The profile of Teacher Leader A was built on the data obtained from the six visits I paid to TLPS primary school, commencing in September 2008 and culminating in March 2009. I

used the journal of the teacher, the questionnaire, the focus and individual interviews and classroom observation to portray this teacher. This profile is crucial to the study undertaken as both professional and personal traits impacted on the leadership roles the teacher engaged in. Stated otherwise, much of what the respondent said, transcribed and did was inextricably linked to his professional and personal qualities.

At the time of the study, TL A was a post-level one educator, a male aged 34 years and married with one child. Although he has an impeccable command of the English language, his first language is Afrikaans. He has a limited knowledge of IsiXhosa, which is the second additional language of the school. Teacher leader A is a formally trained teacher and has a Bachelor of Arts degree, a post graduate diploma in education, a human resource management certificate, a Bachelor of Education (Honours) degree, and is currently completing a Master of Education degree in leadership and management. He has two years teaching experience in a high school, one year experience as a middle manager in the private sector, and seven years in his current post as a primary school teacher. He can be described as highly principled and stands firm in his resolve, even if it meant he was alone on various matters.

He teaches a grade 5 class with Afrikaans as medium of instruction and covers all the learning areas that range from English, Mathematics, Social Science, Economic Management Science, Technology, Natural Science, Arts and Culture and Life Orientation. The teacher pays particular attention to detail as was witnessed by his *savoir-faire* dress-code, donning carefully matched ties and gold cufflinks on each day I visited the school.

TLA expressed his transactional stance in *“I have always wanted to do teaching. The rigid, unfair compensation system depresses me and I find it extremely unfair...some have less qualification and experience than myself”* (journal, p.3). Despite this exclamation, I was impressed to be met with a smartly choreographed name tag on the external side of his classroom door, proudly announcing *‘Welcome to Grade 5: Class Teacher Mr A 2008’*. On entering his classroom, the desks were neatly arranged into groups of six, with charts displaying the vision of the school, budget for the year, graphs depicting learner achievement per quarter, a multitude of teaching equipment such as overhead projector and large mathematical instruments for teacher use.

Initially, TLA appeared to have a rather excessively formal, forceful and seemingly unapproachable disposition. I spoke to colleagues at the school, and they frankly admitted

that “*he takes his work very seriously, and wants to be rewarded for his efforts through promotion and recognition*” (school observation, p.12). It was abundantly clear that TL A was a strict disciplinarian, firm yet fair with his learners who employed behaviourist theory to incentivise learners (observation schedule p.3).

He engaged in continual questioning of management decision-making and culture, and employed unconventional inquiry methods to enhance learner performance. This was evidenced in his almost entitlement view on promotion in the interview when he asserted that “*right now there’s an acting HOD post and we have not been approached. That’s not fair*” (interview p. 6). This could be described as being truculent at best of times, and perhaps churlish at worst, though he was not unduly provocative, but wanted recognition.

Although he remained extremely disconsolate throughout my visit to the school and constantly raised issues of perceived nepotism, he still viewed his contribution to the rich and successful legacy of the school as invaluable, after all TLPS was his Alma Mater. Although he appeared to be the axe-grinder, he was a problem –solver, an evocative leader in that colleagues constantly wanted to check his opinion on various matters, from school safety to pedagogy to the planning of school tours (observation schedule p 9). On each visit I found him mulling over educational publications in his free time, always in a pensive mood (observation schedule p.4, p.12). He learnt to negotiate his leadership with the principal such as making himself available for leading curriculum matters, driving the school bus (interview p.5) as one of two designated drivers, and took a very pro-active stance on learner safety within the school, much learnt from his experience in the private sector.

4.3.2 Teacher leader B: The benevolent dictator

At the time of the study, TLB was a 38 year old female educator teaching Grade 2 with 15 years teaching experience. She hails from Durban and has been at TLPS primary school for the past nine years. Her larger than life frame stood in stark contrast to her gentle demeanour as she warmly hugged the learner that celebrated a birthday during my first visit to her classroom (observation schedule, p 2). Similarly her mantra was “*a teacher must always identify with the emotional needs of their learners, more than imparting knowledge*” (journal, p.8).

She had an immeasurable degree of alacrity and this was forthcoming in her knowing each learner by name, delicately coaxing those that struggled with the Mathematical Literacy lesson she presented on my first classroom observation. On entering her classroom, the discipline of the learners, although enshrined, was evident of both a firm and equally caring teacher. The colourful cartoon-filled curtains that embraced all the windows, the neat table with its many clearly labelled curriculum policy books, as well as textbooks for higher learning, pointed to the professionalism and dedication of the teacher. As she proudly asserted “*classrooms, not principals’ offices, should be citadels of power*” (journal, p.3).

TL B did not come across as an educator who sought promotion. This was unlike the position held by her colleague, TL A, profiled above. In fact, she attempted at all costs to stay away any form of competition or negativity within the school, and spent as much time as possible in her classroom during her free time. When probed on this perceived anti-social behaviour, she affirmed in her journal as follows: “*Moods are contagious. I lead by example. Too much gossip occurs in the corridors, and this could destroy you as a person and the vision you have for your school. I avoid such unnecessary contact* (interview, p. 2).

Instead I witnessed her use of the classroom to give personal advice and mentorship to a senior female learner at school who apparently had learning difficulties due to uncontrollable domestic tensions. In fact she ventured as far as apportioning blame on the principal by stating that “*teachers and principals have the same visions for their schools, they differ only in theory*” (observation schedule, p7). She adopted the notion of ‘what teachers wish principals knew’.

The respondent above found her voice early in her appointment at the school and spoke unequivocally and disapprovingly about tension within the school due to the appointment of the wife of the principal to the deputy position, for example. She stated that this single event could lead to the demise of good working relations and it went deep into issues of trust, transparency and agency among teachers (journal p.6). She can be described as a charismatic leader and highly transformational, with learner success at the core of her duty. Her teaching was not all mechanical nor transmission-like, but individualised and differentiated. She is a visionary, challenges all her learners to do their best, constantly provides the appropriate level of optimism and encouragement, ‘benevolent dictatorship’ immortalised...(observation schedule p.11).

On a personal front, TLA expressed perceived hegemony and domination by senior teachers and those who lay claim to the origins of the school. In this regard, she alluded to two antithetical cultures within the school, one from outside the locality, the other home-grown. To this end she emotively pointed out that older teachers and those from the locality of the school were ‘jealous’ and did not readily take up leadership roles, and when she did, she was viewed with scepticism and not always supported. She is voluble on this matter and raised it on numerous accounts during my encounter with her, indicating that it discouraged teacher leadership (interview p.5; journal p.11). She remained steadfast in her contribution to leadership, and philosophically noted that “*there was far more that united than divided the staff*” (interview p.5). It pleased me most to hear TLB state that she hoped for an organisation for teacher leaders, and this was borne out her role she plays within organised labour (SADTU) as its site steward at school (journal p.6).

4.3.3 Teacher leader C: The heuristic altruist

At the time of my study, TL C was a 37 year old male educator with twelve years teaching experience, all at my case study school. Like TLA, TLPS primary school was his Alma Mater. He has A Bachelor of Arts Degree in Human Movement, with a one year professional teacher certificate.

He came across as somewhat introverted, though affable, very calm and brutally honest about his pedagogic shortcomings. He had no displeasure in my visiting his teaching of the Grade 7 class. During a classroom observation he enquired from me whether I thought his lesson was effective or not, a matter that pointed to his lack of confidence at times (observation schedule, p.9). He stated that there are “*teachers that are capable of doing the same work as me and even do it better*” (journal, p.17). Similarly, during the interview he asserted firmly “*I don’t see myself as eloquent or being able to speak or highly qualified... I never took myself as being able to master things...*” (interview p. 1). Nonetheless, TLC is professionally satisfied and indicated that he, like TL B, sought no immediate promotion within the school. This was despite the fact that he had recently been appointed as the Acting Head of Department in the senior phase.

I found his teaching to be rather perfunctory in that he seemed to ‘want to get the job done’. His classroom seemed rather display-bankrupt as very few posters, academic charts or learner profiles were displayed. He came across as being matter of fact, and that any form of frills were not part of his diction. As an Acting Head of Department, he was aware of the tension

created generally among the older staff who viewed him as inexperienced and unqualified, but more particularly between himself and TL A, a teacher leader within this study. He made every effort not to be abrasive or confrontational with staff members that were in his department, and would rather refer contested matters such as his granting of IQMS scores to the principal for adjudication. *“They see me as junior. You can’t really tell them what to do, but otherwise even in IQMS, I’ve written down for them what to do”* (interview, p.6).

The teacher leader taught in both English and Afrikaans mediums of instruction, with a definite preference for his home language, Afrikaans. By his own admission, he stated in the individual interview that *“I am not very eloquent. Throughout school and university I struggled. I always need someone to nudge me to do something”* (interview p.1). Similarly in his journal he indicated that he had requested the deputy principal to assist him on addressing parents at a grade and school tour meeting, a clear indication of his low self-esteem and lack of confidence (interview p.6).

In my assessment, he appeared very approachable and accessible, long after the end of the formal school day. I met with him on a few occasions late into the afternoon to obtain his view on the accuracy of the transcriptions of the interviews I conducted with him. He did not mind labour intensive activities, and this was evident in his commitment to driving learners in the school bus for sport, cultural and academic trips, far from home. He did not have much pedagogic weaponry and this was manifest in his check-list approach to the lessons he taught, the volume, dates and time of teacher submissions to him, and the itinerary list he constantly referred me to with regards to the parent meetings he conducted.

He ‘reluctantly’ served on the school governing body as the teacher representative, this after he was ‘nudged’ (interview p.3). He also served with greater expertise and confidence on various levels of local, district and national sport committees of the mother body USSASA (United School Sports Association of South Africa) Sport organisation and administration was his forte and this he relished within all zones within and beyond the school (journal p6). Many of the achievements proudly displayed at school and in the local print media can be directly attributed to his commitment to the development of sport.

Equally, the large- scale project, such as the erection of a school pavilion, are as a result of his incessant request and professional link with the corporate world. Most of the walkways and overall infrastructure development of the school were his personal tasks and the school

has moved from bland to grand within a short space of time (observation schedule p.1, journal p.3)

In the following section, I present the key themes of the data.

4.4 The enactment of teacher leadership: a thematic presentation

4.4.1 Teacher leadership: ubiquitous and emergent

During my second visit to the school on in mid-October 2008, I nervously entered the premises to be met by a well-prepared administration clerk who calmly ushered me into the principal's office (observation schedule, p.4). I was invited to join the large staff of 39 teachers for assembly. I was immediately impressed with the hive of well-coordinated activities ranging from teachers assisting in the carrying of the public address system for assembly, to the timeous staff briefing that took just ten minutes giving valued direction for the day (observation schedule p.4). This was an apt example of the fluidity of leadership within the school, the manifestation of various skills of teacher leaders.

Teacher leadership is inherently a component of distributed leadership and Harris (2004, p.13) argues that “distributed leadership concentrates on emerging expertise wherever it exists within the organisation rather than seeking this only through formal position or role”. TLC confidently conducted the assembly, addressing learners on a range of sporting matters, and parent meeting dates (observation schedule p.4). Immediately thereafter, as the teaching day began, I witnessed TLB conducted sports for the junior class in her care, TLA appraised a group of Grade 7 learners who were studying plants in the neatly kept school garden as part of a Natural Science programme. Barth (1998) argues that teacher leadership is evident among all teachers, thereby implying that they harbour extraordinary and untapped leadership capabilities.

I had read on a weekly basis in the local print media about the various infrastructure projects, sport and cultural accolades, as well as the academic awards bestowed upon my case study school. In fact the school had become so popular that there was a space reserved each week for school publications that included their well-deserved achievements, bolstered by photographs of learners and teachers (observation schedule, p.6).

TL A, in his journal described the culture of the school and captured the emergent property of teacher leadership:

We have a staff that assists at all levels in almost all projects that the school takes on. The school motto “Let there be light” is strived for and the staff truly commit themselves to enlighten, educate and empower learners (journal p.2).

In the individual interview with TLA, he verified this emergent leadership by enunciating: “So if I were in my class and a child outside needs my assistance... I won’t see that as someone else’s responsibility. I’ll try render help where it is needed (interview p. 1). This emergent view is further strengthened by TLA in the focus group interview when probed about his understanding of teacher leadership roles.

Well leadership to me is... ability to take on leadership roles, formal and informal, and of course taking initiative to promote the welfare of the school. Informal is say being in charge of boys soccer after school, offering the photocopying of exam material if the Deputy principal is too busy (focus group p.3).

Similarly, TL C in his journal entry on the culture of the school, places on record that “The school is run in a very democratic way. Principal will not implement any rules, regulations, policies unless it was discussed with the staff, governing body and Senior Management Team. Teachers are always given opportunities to lead eg bereavement committee, teachers support team” (journal p. 3). The confidence in leadership is enshrined in the interview by TL B when she stated that:

I’m very busy. From the time I started...well I think for me as person I have lots of skills. So teacher leadership automatically comes easier because of these skills. Besides the classroom, I do lots of fundraising. A lot of teachers automatically come to me for advice also because of being a SADTU site steward.

4.4.2 The concept of teacher leadership: diverse views

In order to unearth the natural though spontaneous response from the three participants in my study, I began by exploring their understanding of leadership first, followed by a more focused enunciation of teacher leadership. In this case study, I found each teacher leader had described the concept largely according to roles they played within the school.

This is similar to the broad definition by Harley *et.al.* wherein they state that teacher leadership is “the possibility of teachers fulfilling particular roles” (2000, p.297). Teacher leadership as a formal and academic concept is well-defined by various authors such as Muijs and Harris (2003), Katzenmeyer and Moller (2001) and Grant (2006), among others. In a similar manner, Grant (2005, p.44) states that “distributed leadership is characterised as a form of collective leadership where all the people in an organisation can act as leaders at one time or another”.

Although the three teacher leaders naturally assumed leadership roles, their formal definitions and emphases differed markedly. TL B defined leadership as “...*a person that offers inspiration to their learners and peers. We have to communicate with their parents. We have to communicate effectively with management in order to solve problems together*” (focus group, p.4). TL A, given his advanced formal education on management and leadership matters offered a comprehensive response by stating that “...*leadership to me is...ability to take on leadership roles, formal and informal, and of course taking initiative to promote the welfare of the school*”(focus group, p.3). He states further that leaders should be well-read so that others “*can trust you without you taking chances*” (focus group, p.5)

The more conciliatory and democratically defined leadership was captured by TL C in “...*they must not be too authoritative... leaders must take everyone’s opinions and ideas into account*” (focus group, p.3). The link between leadership within and beyond the school was saliently captured by TL B, emphasising zone one and zone four:

How will the children do your work if they don’t trust you as a teacher. You’ve got to plan your work everyday, and have interesting and accurate lessons. Sometimes we know their parents. This is a small community...we make means to know each other...so we must be honest and call all parents to see their children’s work even if its good or bad. That’s how we build trust (focus group, p.4).

Similarly TL B concretises the centrality of practice by stating that “*we always lead in the classroom by encouraging learners, and leading good lessons...then we have to lead in the*

school” (focus group, p.4). This is an indication that teacher leaders in particular are firstly experts within their classrooms while at the same time taking on additional leadership roles within the school and in the community. Grant (2008) confirms the above by stating in her model that teacher leaders are firstly expert teachers, keep abreast of new developments and are reflexive practitioners (zone 1, role1). Liaising with and empowering parents about curriculum matters through communication is contained within zone 4, role 2 and indicator 2.

Furthermore, TL C tangentially approached the more academic definition of teacher leadership that includes collegiality when he stated that “ *it’s you working with peers...you approachable... we discuss things all the time in the phase I act in, long after school has dismissed*” (interview p. 1). As an acting head of department, though a level one educator, his action in leading IQMS (2003), an appraisal instrument in South Africa and peer reviews were notable (zone 2, role 4). By virtue of being an ex-officio SMT member, he ensured that structures were in place for the successful interaction between teachers during such peer reviews and enhanced the idea of collegiality. He employed a quasi-principal role and understood that “in order for collegiality to have an impact in schools, principals must ensure that certain structures are in place” (Singh and Manser, 2003, p.70). TL C asserts further that before any review is conducted, “*it is your personality, we discuss things like lesson plans, journals to be handed in and assessment portfolios*” (interview p.1).

The understanding that all those TL C leads have been equally empowered and that the benefit of IQMS (2003) is more developmental than judgemental, is paramount. This confirms the view of Bennet *et.al.* (2003, p.3) that distributed leadership is not something ‘done’ by individuals to others, rather “it is an emergent property of a group or network of individuals in which group members pool their expertise”. TL C clearly undertook to distribute leadership as he proclaimed early during the focus group interview: “*There’s too much to do if you lead teachers in this school. For example I’m now the Grade head and I can’t do all those things, the year plan for the curriculum, assessment, administration...so I always ask even(TL A) who is in my grade group to do things together*” (focus group, p.5).

4.4.3 The impact of values on teacher leadership

The data obtained from across the data sets clearly pointed to a connection between the teacher leaders' values and their leadership. These I found to be common principles of enthusiasm, a preparedness to take on responsibilities, the value of placed on time, and high levels of commitment. Except for TLA, both TLB and TLC did not seek any form of recognition, reward or even acknowledgement from peers or the SMT and portrayed greater transformational than transactional leadership in their actions.

On describing her domestic situation, TLB stated:

Norms and values and respect among all my family members is encouraged. As parents our expectations for them is to accomplish goals and become responsible citizens, and each learner in my class is important. A teacher is a leader psychologically and spiritually and needs to identify learners' emotional needs (journal, p.5).

Accordingly, TLB communicated with parents regularly, without necessarily consulting the principal or the office by keeping a personal communication book completed on a regular basis. Examples from her communication book include: “Sibabalwa (pseudonym) did not do his homework. Parent to receive a notice” as well as “other learners need to see such behaviour will not be tolerated” and “Siyamzukisa (pseudonym)- today is his first day at school-note of concern-to phone parents... learner is bright and eager” (observation schedule, p.2).. Her deep care and concern for the well-being of learners was paramount. This leadership principle is akin to the transformational rather than transactional approach of Day and Harris (2002, p.590), wherein “implicit in this perspective is the notion of shared or devolved leadership where leadership activity is not the preserve of the principal”. Day and Harris (ibid) clearly propagate for transformational leadership as it focuses on moral values, the setting of directions including vision building and the building of relationships with the community.

Similarly, Bush (2003, p.70) argues that “teachers should be involved in decision making and own the outcomes of discussions”. TLA had introduced a uniform club at the school where underprivileged learners benefitted immensely from his controversial stance that they be subsidised by the funds generated from the wealthier learners “Unfortunately these learners

come from broken homes where alcohol and drug abuse is prevalent” (journal, p.1).

Although he did not serve on the dress code or uniform committee of the school, TLA was principled and valued the notion that all learners should be taken care of. The values and expertise he acquired as a scouts leader were brought to the fore in that he distributed the duties among the members of the phase he headed (interview p. 5). This is described by Harris (2004, p.13) in “distributed leadership concentrates on emerging expertise wherever it exists within the organisation rather than seeking this only through formal position or role”.

TL C indicated that he launched and continues to co-ordinate the idea of a feeding system for destitute learners and reported as follows in his journal:

“I run the soup kitchen to feed these children which may be the only meal for the day” (journal, p. 2) Although I indicated that this teacher leader appeared reserved and lacked confidence, his deep family values and Christian ethos catapulted him into leadership in a social services direction. This is similar to the view espoused by Goleman (2000) that every person can demonstrate leadership and every teacher is a leader from the first day they enter the profession. Grant (2008) indicates in her model that this is the “participation in school-level decision-making with the aim of identifying and solving problems” (zone 3, role 6).

Leadership within and beyond the classroom is highly dependant on the availability and management of time. I am of the firm view that teacher leadership can be complemented by informed management, which in turn is the ability to multi-task despite the paucity of time. Throughout the analysis of the various data, I found evidence to corroborate the viewpoint that teacher leaders are indeed excellent managers as well. Generally speaking, all three teacher leaders managed their time well despite the insuperable workload they had. I observed TLA, TLB and TLC teaching, and this was teacher leadership in action (observation schedule p. 4 and 18 respectively). They managed scarce resources and took initiative to supplement any shortages. They paid particular attention to detail in planning and ‘preservation or maintenance’, particular where they intended to sustain high standards (Astin and Astin (2000, p. 8).

During the classroom-based observation of TL B, for example, no time was wasted in knuckling down to the Mathematical Literacy lesson for the Grade 2 class (observation schedule p.3). She quickly wished the birthday beneficiary for the day after checking this from the year plan, disseminated learner workbooks to the 13 learners who sat on their desks eagerly completing previously planned work. Her instruction on the mathematics lesson was

focused when she politely instructed the cooperative learners as follows “*You must be able to do all these in half an hour’s time!*” (observation schedule, p. 4). The data from the interview with TL B revealed a propensity to be time-on-task, with particular reference to good planning at all times: “*In the classroom teacher leadership is having an organised classroom, organised books, having your content organised, you must plan, you must have a vision*” (interview p.1).

In her very first journal entry, TL B was dutifully involved in organising cultural competitions at circuit level, as a deputy chairperson of the circuit committee. She states that the committee’s first meeting was scheduled and she had to guide all the planning for the ensuing year, the upcoming adjudication, as well as all the planning surrounding logistics. “*I drew up the duties of each member for the day. Door control and security personnel were employed*” (journal p.16). The maximisation of time is equally important to TL B, when he stated: “*I’m very punctual. I believe 8 o’clock is 8 o’clock. You have to manage your class, you have to manage the curriculum, you have to manage the content, you have to manage relationships...*” (interview, p.1).

During my observation of TL A in practice, I was astounded at his deft management of a very demanding dual medium format of teaching in all 8 learning areas of his Grade 5 class. This, despite the fact that he served on various committees of the school, such as fundraising, discipline and grade head in particular, as well as being a part-time student (interview p. 3). “*In this grade we have staggered responsibility. I have to prepare lessons in both English and Afrikaans for my three other colleagues who teach only in English. This needs careful planning and good use of time. I do this in each spare minute at school, and sit up late at home each day*” (journal p. 20).

It was evident that TL C advocated for greater management than leadership since he was appointed as an Acting head of Department in the Senior Phase of the school. His use of key wording such as ‘*administration*’, ‘*organisation*’, ‘*managerial*’ and ‘*planning*’ permeates journal entry four when probed on the attributes for teacher leadership (journal p. 10-11).

Time management and overall diligence is captured in the examination by TLC:

As a grade head, I had to see that teachers draw up their examination scripts as well as their memorandums. Time is allocated for each activity. If a teacher falls behind, he or she has to be encouraged so that everybody completes on time, especially in Grade 7 where there’s subject teaching (journal p.22).

Equally, the importance of time was emphasised during my visit to the school in January 2009 where TL C as acting head of department was engaged in dividing learners into class groups, the drafting of preliminary time tables and preparing an agenda for a bi-weekly meeting (observation schedule p.8) (zone three, role five and six). This leadership occurred amidst the chaos of admitting learners, attending to parents, guiding staff in his department and attending to an official from the local municipality who sought the attention of TL C with regards to year fixtures for sport (observation schedule p.9). Muijs and Harris (2003) argue that time should be set aside by those in formal positions in order that teachers meet, plan their work and operate in a collegial manner. TL C further attested to the school's policy on making time available for leadership roles beyond the school. He stated "*I was involved with the IEC (Independent Electoral Commission). The people telephoned me and I attended a lengthy meeting during school hours. When I went to go ask (to attend) it wasn't made an issue*" (interview p.4).

4.4.4 Teacher leaders invite and cope with risk-taking

During the focus group interview, TL B stated that "*sometimes I bring in new things like discipline in the classroom or the use of a good textbook that the school maybe doesn't have*" (focus group, p.6). This position was confirmed in the unconventional disciplinary measures she undertook such as writing letters to the parents of the affected learners, often without informing management. In her daily communication book she stated: "*Letter sent to Njabule's (pseudonym) parents regarding immaturity and failure to complete homework*" as well as "*two learners caught with cell phones. Kindly announce (on the public address system and directed to the principal's office) that phones are not allowed. Learners will be required to clean the classroom and I will speak to their parents*" (observation schedule, p.3). This was not school protocol, yet the outcome of the risk was highly successful as learners appeared disciplined during my visit (observation schedule, p.2). This is similar to the views of Harris and Muijs (2005) where the distribution of leadership is linked to the devolution of meaningful power. The disciplining of learners cannot be viewed as the sole prerogative or responsibility of those who hold formal management positions alone.

Similarly, TL B who is a union representative of the minority of staff members exclaimed: "*I'm a union rep, but they just listen to the principal most of the time. He's in charge of Union X so he's always pushing their views. I pin up flyers and notices in the foyer even if*

they not popular. We need different views .This is democracy” (focus group, p.4). This strong leadership by TL B contradicts the viewpoint of Fullan and Hargreaves (1991, p.30) when they argue that teachers rarely confront and attempt to clarify and develop their sense of purpose”. Instead, TLB’s leadership strengthens the argument by Woods (2004, p.8) that “democratic leadership opens up possibilities for leading 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”.

In his risk-taking approach and arguing for increased school safety, TL A states that “...*the deputy principal will come with a duty roster when the term is half way over. I personally found that a lot of teachers don’t do it , so I ask them to attend ground duties if I find them sitting in the computer class during breaks”* and further proclaims “*I said to them there must be a log book for the gate. People coming in and out must sign”*(focus group, p.6). This appeared to set a limit on the uncontrolled passage of teachers, and in particular, senior members of staff, as well as the reinforcement of learner safety. TL A repeatedly stressed the importance of safety at school:

I continue to do ground duty. Firstly my knowledge of OHASA (Occupation, Health and Safety Act)...so I’ m at one strategic point everyday during break, despite the fact that every second week someone else is assigned the gate...I volunteer to be there because I fear a learner will be badly hurt . I go there against the formal dictates of the roster (interview, p.4).

This is similar to the research by Grant (2006) wherein the importance of holding strong personal values assists teacher leaders in navigating often disconcerting and unsupportive environments. Values such as the courage to lead and take risks, the perseverance to continue with initiating change, regardless of setbacks, and encourage enthusiasm in others, are critical core values of teacher leadership.

4.4.5 Collegiality and collective intelligence

Whilst all three teacher leaders claimed individual competence and efficiency, they acknowledged that they could not single-handedly accomplish their goals without a community of practice (Leithwood, 2000).

TL C aptly stated the need for teamwork and collaboration in the individual interview:

For me its like you have to work with your peers if you want to truly educate the learner. You have to sit and plan together, especially per phase as the demands of the new syllabus are heavy. So basically, before we do things we have meetings. We discuss things all the time (interview p. 1).

The above demonstrates an example from zone two, role 2 wherein teacher leaders provide curriculum knowledge in their own schools and forms part of indicator one and four (Grant 2008).

In the words of TL A: *“I consider myself as an invitational leader with a lot of democratic traits. We have meetings once a week...the meetings are not cast in stone and we discuss curriculum matters mainly. Sometimes we do address issues that affect our teaching style and we each set papers for each other as we teach all learning areas”* (interview p.5).

Similarly, the description of ‘staggered responsibility’ by TL A crystallizes team work and collegiality best. He asserts in his journal entry:

In my school, TLPS primary, we implement a form of collegiality which I call staggered responsibility. Each teacher plans, teaches and manages the various learning areas after consulting the entire group. In other words each teacher will plan, prepare and manage a single learning area for the entire year, and set question papers and tasks for the entire group. This lightens a teachers workload while at the same time ensuring that work is standardised across all learning areas (journal p.18).

Collegiality in, zone two, in particular was similar by the team of Grade two teachers under the leadership of TL B. She states in her journal entry that *“I drew up the assessment portfolio sheets for Numeracy, Literacy and Life skills for the fourth term for the entire group of teachers after lengthy discussions. The tasks had to be typed and rolled off. Miss X and Deputy Y helped with each phase of the administrative duties, and together we completed the assessment for the term”* (journal p. 23).

Similarly, TL C expressed al clear desire to foster collegiality in *“I call grade meetings so that I can get feedback”* and *“when the teachers in a grade work as a team and all the required planning is done together and completed, then teaching can continue”* (journal, p.16-17).

4.5 Teacher leader roles

According to Katzenmeyer and Moller (2003, p.11), “all teachers can select appropriate leadership roles for themselves, given their own experience, confidence level, skills and knowledge”. In my case study school, each teacher leader took on a role according to their interests and competence, as well as wanting to make a difference to the overall improvement of the school. These roles were both formal and informal as described by Leithwood *et. al* (1999).

In keeping with this idea, TL C served in a formal role as a teacher representative on the School Governing Body (zone three, role six). There he led in school-based planning and decision-making processes (indicator five). He stated in his journal: “*I also serve on the School Governing Body which has empowered me on how the school should be run. More knowledge is gained on policy formulation and documents. (I) gained experience on how the interview process is done*” (journal p. 22). TLC had been nominated in a staff meeting and was in his second term of office at the time of the study. This is an example of the “extended” professional referred to by Hoyle (1980) where teachers serve in leadership roles beyond the confines of the classroom.

On the other hand, TLC in the focus group interview, on taking up the grade head position, stated that “*we don’t get formally elected to be grade heads. The teachers in that phase elect us and we work with them in the curriculum and lessons together*” (focus group, p.5) (zone two, role 2). TLA was also democratically elected as the second member of the School Governing Body during the time of the study, and contends “*I serve on the SGB as teacher representative. We basically deal with teacher concerns, budgeting, and the basic running of the school*” (interview p.3) (zone three, role 6).

Furthermore, TL A stated “*I’m also a bus driver. I’m one of five designated drivers at school so whenever learners have to go out on an excursion or day trip, the duties get split among us*” (focus group, p.5). According to Zimpher and Howey (1992) cited in Wynne (2002), teachers should not be coerced into leading in areas where they lack skills, confidence and competence. I am of the view that competency is an inherent ingredient in the volunteerism process. Additionally, TLA confidently contended that “*I serve on the finance committee where I’m constantly involved with fundraising*” (interview, p.3) (zone three, role six). This served to highlight that TLA was in control of the leadership roles and decisions he took as

school. Ash and Persall (2000) indicate that teachers do not feel intimidated with external pressure to meet expected standards if they are in control of their actions. He was the tour-coordinator for the senior class at the time of the study and led all logistical preparations as the school undertook trips out of the province each year.

The time consciousness of TLA was evident in that he was the official bell ringer of the school (observation schedule p.11). He confirmed as follows: *“I’m very punctual. I believe eight o’clock is eight o’clock. I’m very diligent in doing my duties and work above and beyond my calling”* (interview p.1). I found him driving the school bus voluntarily and transported learners who had returned from a distant sport event long after the traditional close of school in the afternoon, and this pointed to his commitment, passion and confidence to lead (observation schedule p.6). This is unlike the trivial and menial leadership tasks depicted by Singh (2007, p.67) where she states *“I won’t consider that as leadership. It’s just passing the buck”*, in depicting that the SMT pass on additional administrative work to teachers masquerading as leadership opportunities.

Similarly, Troen and Boles (1994), Katzenmeyer and Moller (2001) and Harris (2005) emphasise that teachers need to be empowered with leadership roles, ultimately resulting in an increase in their confidence, self-esteem and job satisfaction. Although TL C was a level one teacher, he was appointed as an acting Head of Department for the senior phase of the school. Given his lack of self-worth alluded to in the introduction of this chapter, he argued *“I am also an acting H.O.D which has helped me to gain more confidence. This made me realise that the SMT see certain leadership abilities in me. I play a more administrative, academic role such as doing IQMS, having parent meetings, chairing meetings...”* (journal p. 22-23) (zone three, role four and six).

Noting that TL C occupied a ‘formal’ leadership position as acting H.O.D, he continued to involve many of those in his team in networking in order to achieve desirable results. Gunter (2005) describes this as authorised distributed leadership. He stated in the interview: *“there’s one or two teachers and they’ve been here for years...if they don’t prep lessons... I make a note of that and refer it and tell them to correct that...there’s no way I can force them but report it to the DP. I organised workshops to remedy the problem on prep”* (interview p. 2). However, TLC indicated levels of improved confidence later in the research period and said *“whether on the sport field or curriculum, like the parent meeting I asked MRS P, the DP to assist in addressing the parents. He said there was no need to. What she also said just builds*

you” (interview p.6). This indicated that the SMT were willing to grant TL C greater control of his leadership, and Katzenmeyer and Moller (2003, p.82) confirm that “teachers will be motivated to remain in leadership roles if they experience greater control over their work and if the organizational structures support their efforts to make changes”.

In addition, TL A bemoaned the lack of SMT take-up on his experience gained during his tenure in the private sector with regards to safety at school. However, he was pro-active in his actions: *I’ve been leading in the area of fire-fighting, first aid, evacuation procedures, discipline, safety and security* (interview p.1) (zone three, role six). Lieberman, Saxl and Miles (1998) indicate that effective teacher leadership occurs when a school develops a culture that supports collaboration, partnership and collective decision-making. Little (2000) confirms that top-down approaches are a major hindrance to the development of teacher leadership. This is explored later within this chapter as a possible barrier to teacher leadership.

TL B was an executive member of organised labour during the year of the study. She attended meetings away from the school and although she represented a minority of educators on the staff, took the role very seriously. As a union member, she arranged a District HIV/AIDS symposium for her cluster. She asserted as follows: *“I attended a workshop in June on HIV/AIDS and was a trainer for the District Office. I was amazed at the questions these teachers asked. The educators present were grateful for the information they received”* (journal p.13) (zone four, role three). She consequently asserted: *“As a member of the Circuit Committee, I was responsible for the coordinating of the Circuit cultural competitions. I was the deputy chairperson in 2008. I drew up duties for each member of the committee and was responsible for hiring the hall, arranging awards and liaising with the local media”* (journal p.16). Such distributive leadership is described dispersed distributive leadership by Gunter (2005) and represents a good example of the “extended professional” and is typical of a typology in zone four, role three. More importantly, Spillane (2006, p.14) indicates that “distributive leadership takes shape in the interactions of leaders, followers and their situations which stretches over individuals who have the responsibility for leadership roles”.

This gave TL B the confidence to take on a mentoring role of newly appointed educators (zone four, role 3). She assisted a colleague during recess at school with the detailed planning

of assessment techniques and equipment for the foundation phase (observation schedule, p11). Katzenmeyer and Moller (2001, p.34) support mentorship and state that “holding the respect of their colleagues, capable teacher leaders can mentor new teachers, assist in improving instructional practice, and help to develop the capacity of others”.

All three teacher leaders displayed a natural propensity to mentor learners and colleagues alike. This was not confined to the classroom, but in all areas of school and community life. Leadership narrowly defined as classroom activity is referred to as the “restricted professionalism” and should ideally be substituted with the notion of “extended professionalism”, as described by Hoyle (1980) and Broadfoot (1988).

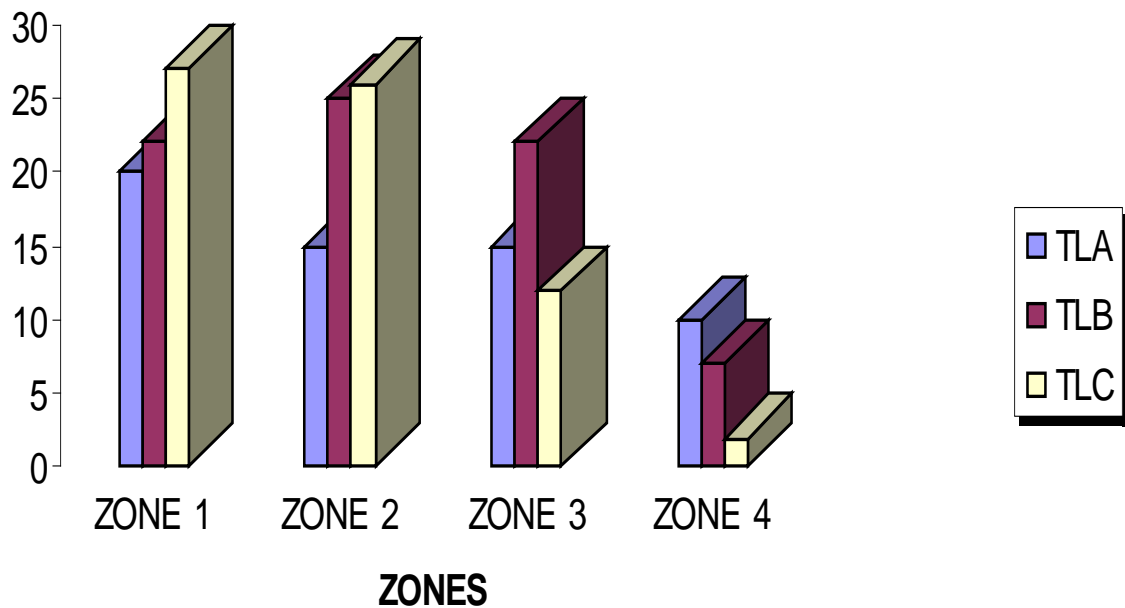
For example, TL A had direct mentorship with grade five, six and seven boys in a scouting project he led (interview p.2). He stated: *“I’m very involved with scouts. Together with the school principal, we are speaking to the department to have a scout group in each school of the District. We train other teachers in scouting matters”* (zone two, role three). This clearly points to his leadership skills and can be regarded as an example of dispersed distributive leadership described by Gunter (2005). This project was also practicalised in his classroom to reinforce discipline and accountability with a reward system. In class he had placed learners into groups with leaders that rotated each week. Innovatively, TLA allowed the leaders among learners to keep careful records of school attendance, marks allocated per group per task, as well as the overall contribution to the fundraising drives of the class and school (journal p.18). At the end the group with highest points received an incentive in the form of delicacies and cash.

In the interview TL A also announced his willingness to mentor learners.

“I coach sports, tennis in particular. This gives me an opportunity to guide the learners on the court on life lessons like punctuality, sportsmanship and perseverance” (interview p.2) (zone three, role five).

To summarise the discussion so far, the figure below gives a graphical description of the various zones in which all three teacher leaders in the case study school.

TEACHER LEADERSHIP ENACTMENT IN ZONES



Without attempting to contrast the scope and degree of their individual leadership, it was apparent that the three teacher leaders led equally in zone one, role one. They continued to teach and improve their classroom practice, with only TL A and TLB improving their studies and attending workshops. TL A was completing her Bachelor of Education (Hons) degree and attended labour related workshops and HIV/AIDS at district level (journal p. 5), while TLB was completing an Master of Education degree (journal p.3). There was little leadership among all three teachers in zone four, role two by “providing curriculum knowledge across schools into the community” (Grant, 2008, p. 93). There could have been barriers that prevented such leadership, as I discuss in the next section.

What has been presented above is a comprehensive response to my first research question that is the enactment of teacher leadership. What now follows are some barriers and opportunities that emerged from the study. These represent the second question of my research that aimed to explore the factors that hindered or promoted teacher leadership in the school.

4.6 BARRIERS TO TEACHER LEADERSHIP

4.6.1. School culture and the recognition of teacher leadership

Harris (2004, p.19) states that “ it would be naive to ignore the major structural, cultural and micro-political barriers operating in schools that make distributed forms of leadership difficult to implement”. Data revealed that there was evidence of structure and cultural barriers to teacher leadership at the case study school. TL B indicated that “*teachers do not receive many opportunities to lead*” (focus group p. 2). Similarly, TL C stated that “*management should not be too authoritative. They must take everyone’s opinion and ideas into account. They can’t run the school without us and our opinions are the majority as post-level one teachers...you see we do most of the work here!*”(interview p.5). When probed on this lack of opportunity, it emerged that the principal commands a large degree of authority in terms of decision-making. Again TL B stated later in the focus group interview that “*we got union reps, but they just listen to the principal most of the time*” (focus group interview p.7).

In fact it was TL A who was the most consistent regarding a lack of recognition throughout. In his journal, he states “*the rigid, unfair compensation system depresses me*”, “*promotions are also not done on merit and this upsets me*” (journal p.3), and “*the department of education itself does not always provide opportunities for leadership development, unlike when I worked in the private sector*” (focus group p.5). In attempting to introduce large-scale safety initiatives in the school such as evacuation procedures, first-aid and stringent gate control, he was bitter that management had overlooked this critical matter for many years. He stated “*management at the moment, it seems they have too much on their plate, that this is not really a concern of theirs at this point in time*” (interview p. 1). According to TLA, the SMT just did not create the platform for his leadership in this area which he gained from the private sector. Symbolically, though, he was one of only two persons that had been given a remote control device for the automatic gate of the school (interview p.4).

My findings served to confirm the view by Harris and Muijs (2005, p. 120) that teacher leadership can only be achieved if “it is facilitated and embraced as a cultural norm within the whole school”. In fact TL B was forthright when she indicated that “*teachers in the profession serving a long time do not feel appreciated. All the attention is now focused on the new teacher who is constantly called upon to arrange functions, and lead in different ways. The senior teacher is thrown in one corner and her opinion becomes unimportant*” (journal p.

32). With reference to her not coming from the same community, TLB added that *“no matter how talented, skilled and knowledgeable the ‘outsider’ is, acceptance and acknowledgement is shortcoming”* (journal p. 33).

4.6.2 Insufficient time

Harris (2004) cites a study by Ovando (1996) wherein it was found that time to meet was a central component of success, and in schools that were improving, they were given dedicated time to collaborate with one another.

On bemoaning the lack of time in the case study school, TL A exclaimed that *“I’m a sport organiser, a bus driver for tours and trips, I do fundraising, and I am a grade head. There’s no time to take on any more leadership duties. I am also a family person. I do not take work home. I do my studies early each morning”* (interview p.3). The lack of time for leadership is emphasised by Katzenmeyer and Moller (2003, p.111) when they cite Zinn (1997) that *“teachers are no different from other adults in their attempts to balance work and family obligations. Teacher leaders may pull back from leadership tasks or even refuse to assume these roles it takes time from personal responsibilities”*.

However, TL B indicated differently *“If I say I will do something by a set time I do it... I do not look for excuses for not doing a specific task”* (journal, p. 22).

4.6.3 The absence of clear communication and authentic consultation

The sentiment regarding communication from TL A was as follows: *“The major barrier that I foresee is the lack of effective communication. The staff are willing to discuss their concerns in the corridors and in informal conversations with selected people...I view my colleagues as cowardly, sly and opportunistic...”*(journal p. 16). My observation at a staff briefing confirmed the above in that indicated that the principal and SMT had previously drafted the agenda, and that teacher leaders were merely informed on matters (observation schedule p11).

In the semi-structured interview, all three teacher leaders pointed to the SMT taking their ideas and running with them as their own. In particular, they referred to substantive ideas on fundraising, discipline and school safety and policy formulation. To illustrate, TL A argued that the deputy principal for example would allow teachers to lead in setting up a fundraising programme, calling of meetings, obtaining management sanction and parental involvement,

then simply hijack the end product. Here he referred to the actual handing over of collected funds, the accounting reconciliation procedure and ultimate announcement of the success of the project.

The heterogeneity of the staff brought with it many tensions and micro-political nuances that stifled teacher leadership. As an example, TLB was adamant that because she did not hail from the local community, all efforts to lead were blocked. She states in her journal that when she attempted to introduce a committee that cared for female staff, the older staff members ridiculed her idea: *“I tried to host an event that would have catered for a teacher who is a single mother, but the support was not there, even from the management”*(journal p. 17).

On a second occasion, TLB grade two class held a nativity play with a Christmas theme within the confines of the foyer of the administration block in November 2008. Needless to say, not much recognition was afforded her enthusiasm and she claims that whilst a few post level one educators applauded, any comments from the principal in particular were conspicuously absent. Perhaps this had stemmed from the absence of the creation of ‘dialogic space’ much required for teacher leadership (Rule, 2004; Grant and Jugmohan, 2008).

4.6.4 Teachers themselves as barriers to leadership

In a strongly worded journal entry on possible barriers to leadership, TL A recorded that *“as a vocal person on my feelings, I view my colleagues as sly and opportunistic. They expect other people to highlight their issues. This leads to a break down of confidence, morale and interest. I think the staff is sitting on a time bomb”* (journal p. 16). This was further illustrated by TLC who, in reference to his colleagues, wrote: *“who are you to tell me what to do, a sense of disrespect. Some of my colleagues may even feel jealous or envious for the position I have”* (journal p. 18).

This pattern of professional jealousy hampered teachers on taking up leadership roles. TLB, in the context of the school, lamented the *“jealousy, intimidation, lack of respect. Senior teachers feel intimidated that they are being replaced to carry out tasks in the school”* (journal p.32). These perceptions negatively influenced the ability of teachers to take on leadership roles, and ultimately resulted in strained working relations. Singh (2007, p.66) describes this as the “politics of participation”.

4.6.5 The SMT as a barrier

In a very frank journal recording (p. 33), TL B stated that “*other barriers include personal relationships with SMT. I’ve seen unqualified teachers, less experienced being given positions as teacher leaders*”. Similarly, TL C claimed in his journal that “*older teachers may feel they have years of experience. They were never given the opportunity to lead by the SMT*” (p.18).

A clearer sign of a barrier to teacher leadership was presented by TL A when he referred to a member of the SMT as a barrier to teacher leadership: “*there are people like the DP that I would say are a hindrance to teacher leadership. You can’t give someday a duty then breath down their neck all the time to see if its done, or halfway, you just take it away and start doing on your own*” (interview p. 6). Similarly, TL B implicated the SMT directly for hindering any further leadership during peer review sessions and stated “*It made me feel used, unappreciated and angry because I constantly have a problem when it comes to IQMS marks. The HOD refuses to acknowledge the extra-curricular activities I lead. This ends up in confrontations and disagreements*” (journal, p. 31).

In one of the strongest statements in the data regarding the SMT, TL B stated that “*jealously, intimidation, lack of respect. Senior teachers feel intimidated that they are being replaced. Some of the teachers and SMT staff members actually go out of their way of making a teacher leader feel intimidated*” (journal, p.31). It appeared that TLB had a negative view of the SMT appointments, and although she did not aspire to become a member of management, stated “*personal relationships with SMT is highly regarded above those of commitment, skills, knowledge. I’ve seen unqualified, less experienced, unskilled teachers being given positions*” (journal p, 34).

The above section dealt with the barriers to teacher leadership in the school. The following section deals with factors that enabled teacher leadership in the school in attempt to answer the second part of my research question. To remind the reader, the question was: What factors promoted teacher leadership?

4.7 FACTORS THAT PROMOTED TEACHER LEADERSHIP

4.7.1 The principal as a leader

TLB acknowledged the principal's public support for leadership initiatives when she successfully fundraised during a valentine day. She stated that *"The principal thanked all staff members, for their time effort and involvement in making the day a success"* (journal p. 30). Similarly, TL C indicated *"that we do get enough opportunities to take the lead, the principal encourages that in all of us. We can fundraise, mentor sports, have cultural competitions. As long as the learners are well taught"*(interview p.4).

Such forms of recognition, as well as the space to lead are echoed by Barth (1998, p.64) in "recognition replenishes a teacher, both personally and professionally". The principal appeared consistent in entrusting teachers with decision-making opportunities as stated by TL A *"I think the SMT and principal especially, is very accommodating. They actually encourage people to come forward with their point of view and most of the time they consider it..."* (interview p. 6). Barth (1988) argues for consistency among principals in entrusting teachers with decision-making opportunities.

4.7.2 Culture of the school

The school had a strong instructional leadership ethos, premised on success in academic, cultural and sporting matters. The many accolades in the foyer and newspaper remarks bore testimony to their success (observation schedule, p.5). TLB for example indicated that *"we do constantly motivate and encourage each other, boost morale...without attacking the person, lets attack the problem"*. (interview, p. 4). TLB continued and intimated that *"this school is so big, there are many different areas for development from finance to sport to culture and teachers are willing. Teachers love their jobs especially this school. They want to help"* (interview p. 5).

4.7.3 Ability, confidence and vision of teacher leaders

TL A indicated in reference to his abilities and experience from the private sector that *"I think I've got a number of attributes. I'm diligent in my duties. Some of the skills I have...I've done performance reviews, human resource management..."* (interview, p.1). Similarly TL B

pointed to inimitable organisational skills when honouring a fellow colleague stated “*I decorated the venue. I collected money and purchased refreshments for tall the lady teachers who attended*” (journal p.19).

4.8 CONCLUSION

The South African Schools’ Act of 1996, as well as The Norms and Standards for Educators (2000), amongst many other policy documents, provides for a legal framework for the implementation of teacher leadership in schools. This chapter depicted the various roles that teacher leaders took up at TLPS primary school, and depicted opportunities as well as barriers to such leadership. This study revealed that teachers are visionary leaders and their efforts at collaboration and participatory decision-making resulted in school effectiveness. Teachers did not solely await the delegation of roles, but led voluntarily and through nomination in various committees.

The ensuing chapter summarises these findings, offers concluding remarks on teacher leadership, and presents a few suggestions for future research in within the framework of distributed leadership theory.

CHAPTER FIVE

CONCLUSION

5.1 INTRODUCTION

This chapter summarises the main findings of my research project. I begin with a brief discussion of the enactment of teacher leadership, followed by a discussion on the factors that hindered or promoted this leadership. Thereafter I examine the broad-based limitations and challenges I encountered during the research process, and conclude with a few recommendations for future research into teacher leadership.

My study aimed at exploring how teacher leadership was enacted in the semi-urban primary school in question, as well as the factors that hindered or promoted that leadership. This research study suggests that level-one teachers, who do not hold formal positions of management, can be visionary leaders within their schools. Both TL A and TLB did not hold any formal management position, but had taken on leadership roles in various committees and structures of the school. However TL C, though a level one educator, was impetuously nominated by the SMT to serve as an acting HOD in the senior phase. Although the above can be regarded as leadership in a formal position of management, I maintained the status of TL C as a respondent simply because he was a leader, as well as the fact that he officially held a level one post. This has been defined by Harris (2005) as a form of delegated leadership by the SMT. TL C, in pursuing his leadership, indicated in the focus group interview (p. 4) that *“it’s all the things teachers do to lead the education of children, in fact we lead in the classroom ... then we lead as teachers. I delegate duties to other teachers to help”*. It however resulted in palpable tension between TL A and himself. TL A felt that he better suited the acting position due to his qualification and experience in the private sector (journal, p.3).

5.2 TEACHER LEADERSHIP: SOME CHARACTERISTICS

5.2.1 Attitude determines altitude

All three teacher leaders in the case study school indicated a positive attitude towards the teaching profession. TL B was adamant and unequivocal and stated in the interview, when what teacher leadership meant to her that: *“You need to love your teaching, you need to be committed in your teaching”* (interview p.3). Similarly TL A stated: *“I enjoy teaching mostly.*

I have always wanted to do teaching”(journal, p.4). Furthermore, in the focus group interview, TLA captures the joys of his profession plainly and honestly: *“Informal to me is when you as the teacher just take the lead in the things you truly want to do because you like doing them. I like going with the learners on trips...”* (focus group p.2).

The consistent decree by all three teacher leaders on the enjoyment of their calling is immortalised in the loyalty to the profession by TL C:

When I was a learner at school I realised that I enjoy schooling, so the only way for me to stay in school was to become a teacher. It’s very rewarding to see how learners grasp new concepts, moving from the known to the unknown. I enjoy interacting with the learners, developing their young minds, not only academically, but physically and mentally as well (journal, p.3).

Similarly, TL C stated that *“Even like with the acting HOD position that I’ve received. Because I was very reserved whether I should take it or...and being in it I’m actually enjoying it* (interview p. 2). This supports the notion held by Wasley (1991, p.23) in that teacher leadership is “the ability to encourage colleagues to change, to do things they wouldn’t ordinarily consider without the influence of the leader”.

Besides personal professional development, all three teacher leaders viewed the need to master content and teaching as their most central role (Grant 2008, role 1, zone 1). I agree with their position as expert practitioners as this central focus of teacher leadership cannot be relegated. To TL B, expert classroom practise automatically leads to confidence in leading in other areas such as committees for fundraising, teacher welfare, district cultural programmes, and even on organised labour. She explained that *“You must understand all the goals and vision of the department. You need to teach them (learners) well...because first of all you need to know your content...you must have goals within your content...”* (journal p.4).

5.2.2 Centrality of expert practice: Professional development

With the exception of TL C, the other two teacher leaders viewed continued professional development as a central feature that assisted them in their roles as leaders. None so than depicted in their journals. For example TL A asserted: *“I have skilled myself as a teacher expert by furthering my studies... to teach my learners, improve the school, uplift my*

community with the latest developments on the educational front” (journal p.2). TL A lists extensively the recent courses he had completed ranging from honours degree in education, and proudly states in his first journal entry that he is a current student of higher learning completing a Master of education degree (journal, p.3).

For teacher leader C there was no indication that he had registered for any further professional training at tertiary level. It suffices to indicate that he nonetheless views school- and- community based professional development programmes very highly: *“Like Mrs X(Deputy Principal) asked me when can she come conduct IQMS in my class. But when I looked at my work, everything was in order so I told her she could come immediately. It keeps you on your toes”*(interview, p.4). Similarly, as a master trainer for the Independent Electoral Commission (IEC) in March 2009, TLC indicated that the position empowered him in so far as planning, meeting deadlines, addressing concerns and risk management were concerned. His tenure on the Love Life local committee equipped him with the skills to address the social factors of the pandemic at school and community level. TL B proudly recorded that *“I am in my second year honours degree specialising in Whole School Management with Nelson Mandela Metropolitan University. I believe teachers are essential drivers of quality education, and all teachers need to enhance their skills”* (journal p.5). The professional development unquestionably raised the confidence level of these two teacher leaders who readily availed themselves to lead by volunteering or accepting nomination onto committees. For example, she served as a site steward in organised labour structures, served as a deputy chairperson of the District Cultural Committee as well as being an HIV/AIDS co-ordinator for the circuit.

This confidence is unlike that of TL C as evidenced in his individual interview:

Like for myself, I need that nudge. I most probably don't have the confidence to stand and say here I am. So being teacher leader most probably people can pick up what kind of personality you have because as I've said I don't see myself as being very eloquent or being able to speak or very highly learned.(journal p.1).

5.2.3 Communication as a central feature

Effective communication, listening skills and empathy were features among all three teacher leaders. They indicated that respectful communication with learners, convincing and non-confrontational communication with the SMT, constant professional dialogue with

colleagues, unapologetic and incessant communication with the private sector for funding, were ingredients for school improvement. For example, in the focus group interview, TL B was voluble on the issue of accurate communication. She claimed that *'they (teacher leaders) must always communicate and have listening skills and patience. They must communicate with these learners from different homes and backgrounds first because they teach them. They must communicate with the management so that problems can be fixed'*.(journal, p.3).

Furthermore, a document analysis of her informal communication booklet kept in her class revealed that she had infinite propensity to keep track of all communication among colleagues, parents, management and learners. Each day she would painstakingly jot down her communication message, with accurate reflection of time and date, almost a diarising crucial communication matters. Some reflections were as follows (observation schedule p.11).

Candice and Bongelike swearing in class-call parents

Candice sent to office for writing graphic letters-other learners need to see such behaviour will not be tolerated

Two learners in my class have cellphones with airtime, can you believe it! Please announce on the intercom that cellphones are not allowed.

This form of explicit communication was not forthcoming from TL C, the Acting Head of department. The analysis of both his journal and individual interviews pointed to his lack of confidence, largely because of two factors: That he is not entirely bilingual and struggles somewhat with communicating in English with his colleagues and secondly that he is naturally a nervous person. He was aware that his appointment has been met with mixed reaction, particularly from older staff members, and those he perceives as being more qualified for the position: *"So just before I went for the interview at school I went for one at the Department where I blundered. I really messed up. I'm generally a nervous person"* (interview p.9). He indicated that he had difficulty in addressing parents at a grade meeting and requested the deputy principal to assist him. She refused stating that he has the ability and by his own admission later states in the interview *"So I think I must of gotten over the fear, the shyness of talking to crowds"* (interview p.5).

However, this apparent shortfall is mitigated by his work ethic and perfunctory approach to getting the job done. He indicated that when teachers chose to abuse his communication

deficiency, he simply resorted to a check list when implementing IQMS, for example (observation schedule p. 13). Secondly, the decision by the deputy principal undoubtedly served as factor that promoted teacher leadership by building confidence to communicate with parents.

It is my view that effective communication addresses the concept of the personality of teacher leaders. The three teacher leaders displayed a natural disposition of approachability, genuine care for learner and colleagues and were acutely attuned to the social needs and backgrounds of their learners in particular (observation schedule p.3). All three spoke with authority on the social impact of the debilitating effects of apartheid policies, but none more so than TL B. With a sudden and animated burst of political activism, she exclaimed in the interview (p.4): *“I strongly feel that the one teacher putting the other down...we need to constantly motivate and encourage each other...address the problem without attacking the person...this requires communication in a professional manner”*.

In the intrepid journey of data analysis, it became clear that these were very early days during the study as both these teacher leaders changed their sentiments during interviews and journal entries. TL C, perhaps due to being nominated as an acting head of department by the SMT, differed with the other two respondents in terms of the SMT support for teacher leadership. He stated that *“I think the SMT is very accommodating in that they listen, they always listen to what you have to say. They actually encourage people to come forward...”* (interview p.). Such appointment is defined by Gunter (2005) as authorised distributive leadership on the part of those in formal positions.

Although TL B stated in her journal that *“I feel as though I will not participate in any extra curricular activities I will work in my class only”* (journal, p. 31), evidence to the contrary indicated that she led workshops on HIV/AIDS and labour related matters at district level. The findings from the study seem to suggest that teacher leaders act out their roles for various reasons: they seek to test their skills and knowledge; they aim to ‘check out’ the very culture of the organisation and desire to establish their voices early in the organisation, such as TL B. They engage the SMT to probe how far they could lead programmes without taking over. In my view they do so seeking encouragement more than recognition, wanting to avoid typecasting or repetition of roles, wanting to be genuinely innovative and creative and wanting to establish professional identities.

Teacher leaders have contemporary perspectives on transformation of education, and they ensure that the school is committed to sustained professional development. They are acutely observant of the recent past, indulge in the present and seek to shape the future of the school by exposing their values and priorities for the school without being dissenting. They care too much for the well-rounded development of all their learners, and as such cannot be the sole providers of all the knowledge required to achieve this goal. There was a sincere admission by all three teacher leaders that they were not the all-knowing knowledge repositories but were facilitators in the collective development of learners (focus group p. 4). There was much talk of teamwork, and none claimed to have mastered the complexity of developing the mind, body and spirit of the learner single-handedly. For them, and in line with Smylie (1995), collaboration and teamwork enhanced the capacity of schools to improve. I observed TL A and TLB refer learners to various leaders, each being masters in their own right, and it is this vulnerability from all three teacher leaders that was commendable (observation schedule, p. 15).

5.2.4 Striking the transactional/transformational balance

Teachers must be both transactional and transformational in their teaching (Bass, 1990). It is important that teachers provide a clear framework of expectations and outcomes for all learners to strive towards, and these in turn provide students with structure and discipline. Transformational leadership among teachers are those that are charismatic, provide motivation, intellectual stimulation, and are considerate of all students (Bass, 1996). The charismatic teacher presents the important values of the community, emphasises commitment to obtaining goals, and emphasises trust. In my view, TL A best represented the balance between transactional and transformational leadership.

5.3 RECOMMENDATIONS FOR FURTHER RESEARCH

Principals and those who hold formal management positions in schools need to put in place structures that enhance teacher leadership among all members. In other words, they need a formal induction on the concept of teacher leadership. What could be of assistance is the ‘certification of principals’ as alluded to by scholars such as Wright (2008), wherein teacher leadership could be institutionalised through policy.

There are prescripts already in place in the South African education system such as the Norms and Standards for Educators (2000), as well as the South African Schools’ Act of

1996. These documents lay the foundation for teachers to take up leadership roles, but there is no monitoring by authorities in this regard. Perhaps an official directorate should be established within the Department of Education that looks at teacher leadership and related matters, for such distributed leadership can only serve to improve schools.

I argue that teacher leadership is ubiquitous and that the paradigm shift should begin with formal recognition of the concept in South Africa. Authorities, technocrats, policy makers and politicians need to give greater credence to the populace that lead education than to the few in formal management positions. Teacher leadership occurs in every meeting place within and beyond the school, formally and informally. We ought to suspend our thinking that schools are *buildings* and that teacher leadership occurs only when juxtaposed against traditional and conventional roles and responsibilities. Research, then, at circuit and district office level, could possibly reveal the perceptions officials have about teacher leadership.

5.4 Some reflections on the group project

As already stated throughout this dissertation, my research was part of a broader team of 10 other student researchers. Most of the principles that relate to distributive leadership theory and teacher leadership in particular, were applicable to this group. These relate to the development of trust, group dynamics and the development of a ‘community’ of researchers Gunter (2005. P.49). It is imperative to note that this in itself served as a form of “teacher leadership” in that we frequently met and discussed in a collegial manner, the details of each of our research processes.

We shared work as a team throughout, akin to the notion of “stretched over by Spillane (2003, p.535). Similarly, this group can be described as that of “conjoint agency which means agents synchronise their actions by having regard for their own plans, those of their peers, and their sense of unit membership (Gronn, 2002, p.431). It is my view then, that research conducted by a team, especially novice researchers, offers much more than what could have been obtained from individual contributions.

5.5 CONCLUSION

The demands placed on educators vary widely with some tasks being purely administrative, while others require higher order thinking and inspirational persuasion. Teacher leaders themselves must instil a sense of teamwork and leadership in their students (Flint, 2000). By

so doing, they encourage learners to work in self-managed groups inside and outside the classroom, such as in co-operative learning projects, laboratory experiments, group projects which enhance academic content as well as improve social skills. This in turn boosts learners' self-esteem, celebrates diverse learning styles, creates active learning environments and focuses on success for everyone (Houghton, 2000, cited in Flint 2000). Teachers must be visionary while they serve as a role model for students. Visionary teachers provide a historical perspective, energise students, give clarity and meaning to work, establish a standard of excellence. This is similar to the South African Quality Learning and Teaching Campaign (QLTC) of 2008 where schools are regarded as centres of excellence.

The visionary teacher leader is a great motivator of learners and colleagues, challenges all to do their best, and seeks to provide appropriate levels of optimism and encouragement (after Obama, 2008). They question old assumptions and misconceptions and stimulate new ways of thinking (Flint, 2000).

As a consequence, teacher leadership ought to be on educational 'billboards' proudly advertising itself as an invaluable commodity to be consumed in particular by principals, policy makers and politicians. I am convinced that there exists an inextricable link between teacher leadership and student learning and achievement. Is teacher leadership in South Africa then equally not about leading in any place, space and time as long as we challenge learners, teachers and parents to take up citizenship of the school and its community? Similar to the argument by Rule cited in Grant (2009, p. 41), I contend that it is incumbent upon the leadership from those who hold formal management positions to create these 'safe spaces' which "encourage openness and trust, and facilitate critical engagement within and among participants".

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APPENDICES 1-11

APPENDIX 1

TEACHER LEADERSHIP IN ACTION 2008 - 2009

SCHOOL OBSERVATION SCHEDULE

1. Background information on the school

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

○ List	○ Yes (describe)	○ No
○ Library	○	○
○ Laboratory	○	○
○ Sports facilities/sports kit	○	○
○ Soccer field	○	○
○ netball field	○	○
○ tennis court	○	○
○ cricket field	○	○

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

2. Staffing

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

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

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

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

Organisational Structure

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

5. Relationships with Education department and other outside authorities

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

APPENDIX 2

TEACHER LEADERSHIP IN ACTION 2008 - 2009

TEACHER QUESTIONNAIRE

INSTRUCTIONS FOR QUESTIONNAIRE

- Use a BLACK or BLUE ink pen. Please do not use a pencil.
- In the interests of confidentiality, you are not required to supply your name on the questionnaire.
- Please respond to each of the following items by placing a CROSS, which correctly reflects your opinion and experiences on the role of teacher leadership in your school.
- This questionnaire is to be answered by an educator.¹

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

A. BIOGRAPHICAL INFORMATION

1. Gender

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

2. Age

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

3. Your formal qualification is:

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

4. Nature of employment

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

5. Employer

State		SGB	
-------	--	-----	--

6. Years of teaching experience

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

B. TEACHER LEADERSHIP SURVEY

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

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

B. 1

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

B. 2

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

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

Instruction: Please respond with a CROSS either Yes/ No/ Not applicable, to your involvement in each committee.

If YES, respond with a CROSS by selecting ONE option between: Nominated by colleagues, Delegated by SMT or Volunteered.

B.3

				How I got onto this committee:		
I play a leadership role in the following committee/s:	Yes	No	Not	Nominated by colleagues	Delegated by SMT	Volunteered
27. Catering committee						
28. Sports committee						
29. Bereavement /condolence committee.						
30. Cultural committee.						
31. Library committee.						
32 Subject/ learning area committee.						
33 Awards committee						
34 Time- table committee.						

35. SGB (School Governing Body)						
36. SDT (School Development Team)						
37. Fundraising committee.						
38. Maintenance committee.						
39. Safety and security committee.						
40. Discipline committee						
41. Teacher Union						
42. Assessment committee						
43. Admission committee						
44. Other (Please specify)						

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

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

B.4

My school is a place where:	4	3	2	1
45 The SMT has trust in my ability to lead.				
46. Teachers resist leadership from other teachers.				
47. Teachers are allowed to try out new ideas.				
48 The SMT (School Management Team) values teachers' opinions.				
49. The SMT allows teachers to participate in school level decision-making.				
50. Only the SMT takes important decisions.				
51. Only the SMT takes initiative in the school.				
52. Adequate opportunities are created for the staff to develop professionally.				
53. Team work is encouraged.				
54. Men are given more leadership roles than women.				

D. Teacher Leadership: Open-ended questions

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

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

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

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

Thank you for your time and effort!

APPENDIX 3
TEACHER LEADERSHIP IN ACTION 2008 - 2009

SMT QUESTIONNAIRE

INSTRUCTIONS FOR QUESTIONNAIRE

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

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

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

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

A. BIOGRAPHICAL INFORMATION

1. Gender

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

2. Age

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

3. Your formal qualification is:

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

4. Nature of employment

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

5. Years of teaching experience

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

6. Period of service in current position

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

B. SCHOOL INFORMATION

7. Learner Enrolment of your school

1-299	300-599	600+	
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8. Number of educators, including management, in your school

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

9. School type

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

10. School Fees

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

C. TEACHER LEADERSHIP SURVEY

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

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

C. 1

I believe:	4	3	2	1
11. Only the SMT should make decisions in the school.				
12. All teachers should take a leadership role in the school.				
13. That only people in formal positions of authority should lead.				
14. That men are better able to lead than women				
15. Educators ⁱⁱ should be supported when taking on leadership roles				

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

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

C.2

Which of the following tasks are you involved with?	4	3	2	1
16. I work with other educators in organising and leading reviews of the				

school year plan					
17. I encourage educators to participate in in-school decision making					
18. I support educators in providing curriculum development knowledge to other educators					
19. I support educators in providing curriculum development knowledge to educators in other schools					
20. I provide educators with opportunity to choose textbooks and learning materials for their grade or learning area					
21. I work with other educators in designing staff development programme for the school					
22. I include other educators in designing the duty roster					

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

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

C.3

My school is a place where:	5	4	3	2	1
23. The SMT has trust in educator's ability to lead.					
24. Educators are allowed to try out new ideas.					
25. The SMT (School Management Team) values teachers' opinions.					
26. The SMT allows teachers to participate in school level decision-making.					
27. Only the SMT takes important decisions.					
28. Only the SMT takes initiative in the school.					

29. Adequate opportunities are created for the staff to develop professionally.					
30. Team work is encouraged.					
31. Men are given more leadership roles than women.					

D. Teacher Leadership: Open-ended questions

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

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

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

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

Thank you for your time and effort!

APPENDIX 4

TEACHER LEADERSHIP IN ACTION 2008 - 2009

TEACHER LEADERSHIP OBSERVATION SCHEDULE

(BORROWED FROM HARRIS & LAMBERT, 2003)

A. Adult Development			
1. Defines self in relation to others in the community. The opinions of others, particularly those in authority, are highly important.	Defines self as independent from the group, separating needs and goals from others. Does not often see the need for group action.	Understands self as interdependent with others in the school community, seeking feedback from others and counsel from self.	Engages colleagues in acting out of a sense of self and shared values, forming interdependent learning communities.
2. Does not yet recognise the need for self-reflection. Tends to implement strategies as learnt without making adjustments arising from reflective practice.	Personal reflection leads to refinement of strategies and routines. Does not often share reflections with others. Focuses on argument for own ideas. Does not support systems which are designed to enhance reflective practice.	Engages in self-reflection as a means of improving practices. Models these processes for others in the school community. Holds conversations that share views and develops understanding of each other's assumptions.	Evokes reflection in others. Develops and supports a culture for self-reflection that may include collaborative planning, peer coaching, action research and reflective writing.
3. Absence of ongoing evaluation of their teaching. Does not yet systematically connect teacher and student behaviours.	Self-evaluation is not often shared with others; however, responsibility for problems or errors is typically ascribed to others such as students or family.	Highly self-evaluative and introspective. Accepts shared responsibility as a natural part of a school community. No need for blame.	Enables others to be self-evaluative and introspective, leading towards self- and shared responsibility.
4. In need of effective strategies to demonstrate respect and concern for others. Is polite yet primarily focuses on own needs.	Exhibits respectful attitude towards others in most situations, usually privately. Can be disrespectful in public debate. Gives little feedback to others.	Consistently shows respect and concern for all members of the school community. Validates and respects qualities in and opinions of others.	Encourages & supports others in being respectful, caring, trusted members of the school community. Initiates recognition of ideas and achievements of colleagues as part of an overall goal of

			collegial empowerment.
B. Dialogue			
1. Interactions with others are primarily social, not based on common goals or group learning.	Communicates with others around logistical issues/problems. Sees goals as individually set for each classroom, not actively participating in efforts to focus on common goals.	Communicates well with individuals and groups in the community as a means of creating & sustaining relationships and focusing on teaching and learning. Actively participates in dialogue.	Facilitates effective dialogue among members of the school community in order to build relationships and focus dialogue on teaching and learning.
2. Does not pose questions of or seek to influence the group. Participation often resembles consent or compliance.	Makes personal point of view, although not assumptions, explicit. When opposed to ideas, often asks impeding questions which can derail or divert dialogue.	Asks questions and provides insights that reflect an understanding of the need to surface assumptions and address the goals of the community.	Facilitates communication among colleagues by asking provocative questions which open productive dialogue.
3. Does not actively seek information or new professional knowledge which challenges current practices. Shares knowledge with others only when requested.	Attends staff development activities planned by the school or district. Occasionally shares knowledge during informal & formal gatherings. Does not seek knowledge that challenges status quo.	Possesses current knowledge and information about teaching and learning. Actively seeks to use that understanding to alter teaching practices. Studies own practice.	Works with others to construct knowledge through multiple forms of enquiry, action research, examination of disaggregated school data, insights from others & from outside research community.
4. Responds to situations in similar ways; expects predictable responses from others. Is sometimes confused by variations from expected norms.	Responds to situations in different, although predictable ways. Expects consistency from those in authority and from self.	Responds to situations with an open mind and flexibility; welcomes multiple perspectives from others. Alters own assumptions during dialogue when evidence is persuasive.	Promotes an open mind and flexibility in others; invites multiple perspectives and interpretations as a means of challenging old assumptions and framing new actions.
C. Collaboration			
1. Decision making is based on individual wants and needs rather than those of the group as a whole.	Promotes individual autonomy in classroom decision making. Relegates school decision-making to the principal.	Actively participates in shared decision-making. Volunteers to follow through on group decisions.	Promotes collaborative decision-making that provides options to meet the diverse individual and group needs of the school community.

2. Sees little value in team building, although seeks membership in the group. Will participate, although does not connect activities with larger school goals.	Doesn't seek to participate in roles or settings that involve team building. Considers most team building activities to be 'touchy-feely' and frivolous.	Is an active participant in team building, seeking roles and opportunities to contribute to the work of the team. Sees teamness as central to community.	Engages colleagues in team-building activities that develop mutual trust and promotes collaborative decision-making.
3. Sees problems as caused by the actions of others, e.g. students, parents; or blames self. Uncertain regarding the specifics of one's own involvement.	Interprets problems from own perspective. Plays the role of observer and critic, not accepting responsibility for emerging issues and dilemmas. Considers most problems to be a function of poor management.	Acknowledges that problems involve all members of the community. Actively seeks to define problems and proposes resolutions or approaches which address the situation. Finding blame is not relevant.	Engages colleagues in identifying and acknowledging problems. Acts with others to frame problems and seek resolutions. Anticipates situations which may cause recurrent problems.
4. Does not recognise or avoids conflict in the school community. Misdirects frustrations into withdrawal or personal hurt. Avoids talking about issues that could evoke conflict.	Does not shy away from conflict. Engages in conflict as a means of surfacing competing ideas, approaches. Understands that conflict is intimidating to many.	Anticipates and seeks to resolve or intervene in conflict. Actively tries to channel conflict into problem-solving endeavours. Is not intimidated by conflict, though wouldn't seek it.	Surfaces, addresses and mediates conflict within the school and with parents and community. Understands that negotiating conflict is necessary for personal and school change.
D. Organisational change			
1. Focuses on present situations and issues; seldom plans for either short or long term futures. Expects certainty.	Demonstrates forward thinking for own classroom. Usually does not connect own planning to the future of the school.	Develops forward thinking skills in working with others and planning for school improvements. Future goals based on common values and vision.	Provides for and creates opportunities to engage others in forward (visionary) thinking and planning based on common core values.
2. Maintains a low profile during school change, basically uninvolved in group processes. Attempts to comply with changes. Expects compliance from others.	Questions status quo; suggests that others need to change in order to improve it. Selects those changes which reflect personal philosophies. Opposes or ignores practices which require a school-wide focus.	Shows enthusiasm and involvement in school change. Leads by example. Explores possibilities and implements changes for both personal and professional development.	Initiates action towards innovative change; motivates, draws others into action for school & district improvements. Encourages others to implement practices which support school-wide learning. Provides follow-up planning and

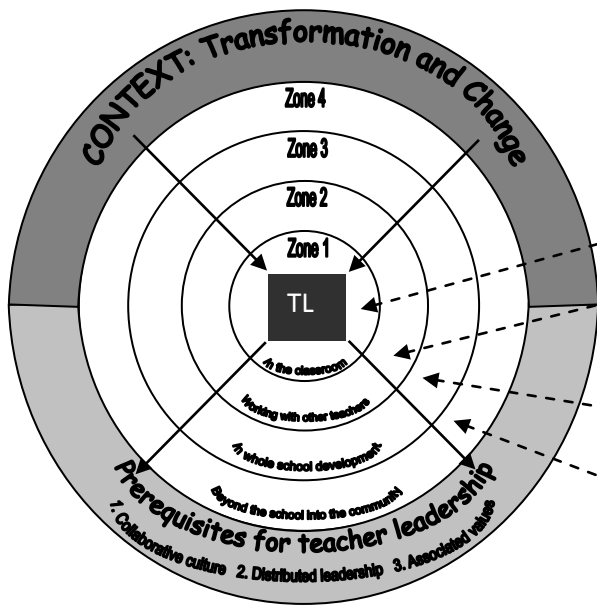
			coaching support.
3. Culturally unaware. 'I treat everyone the same'. Stage of naivety to socio-political implications of race, culture, ethnic and gender issues.	Growing sensitivity to political implications of diversity. Acknowledges that cultural differences exist and influence individuals and organisations.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

APPENDIX 5

TEACHER LEADERSHIP IN ACTION: 2008 – 2009

ZONES AND ROLES MODEL OF TEACHER LEADERSHIP

(Grant, 2008)



TEACHER LEADERSHIP

First level of analysis:
Four Zones

Second level of analysis:
Six Roles

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

APPENDIX 6

TEACHER LEADERSHIP IN ACTION: 2008 – 2009

TEACHER LEADER JOURNAL ENTRIES

Journal Entry 1 (Week 3 October 2008)

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

About your school:

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

About you:

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

Think about yourself as a teacher leader:

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

Journal Entry 2 (1st half of November 2008)

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

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

Journal Entry 3 (2nd half of November 2008)

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

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

Journal Entry 4 (1st half of February 2009)

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

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

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

- i. List the skills and knowledge you have.
- ii. Why do you think this knowledge and these skills are important in developing teacher leaders?

- iii. Are there any other skills/knowledge you think are important and which you would like to develop to make you an even better teacher leader?

Journal Entry 5 (2nd half of February 2009)

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

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

Journal Entry 6 (1st half of March 2009)

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

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

Journal Entry 7 (2nd half of March 2009)

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

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

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

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

APPENDIX 7

TEACHER LEADERSHIP IN ACTION: 2008 – 2009

TEACHER LEADER FOCUS GROUP INTERVIEW

1. Talk to me about leadership. What does the word 'leadership' mean to you?
2. Talk to me about teacher leadership? What does the term mean to you?
3. When you think of yourself as a teacher leader, what emotions are conjured up? Why do you think you feel this way? What do you suspect is the cause of these emotions?
4. Think about teacher leadership in a perfect school! What would the teacher leader be able to achieve (probe roles/skills/knowledge/relationships)? What support would the teacher leader have (probe culture/ SMT/other teachers etc.)?
5. Teachers usually serve on a number of committees, or in various roles in schools. What, then, do you understand by the terms delegation, volunteerism and nomination?

Thank you!

APPENDIX 8

TEACHER LEADERSHIP IN ACTION: 2008 – 2009

TEACHER LEADER INDIVIDUAL INTERVIEW

This interview will be loosely structured and based on the reading of the journals of the teacher leaders. Questions cannot therefore be planned at the outset of the project but will emerge as the research progresses. Questions may also differ from the one teacher leader to the other.

However, broadly speaking, I would like to ascertain during this interview, the following:

1. the personal attributes of these teacher leaders
2. the zones and roles that teacher leaders are engaged in
3. the main barriers that the teacher leaders experience

I redesigned the following more specific questions:

1. Describe what teacher leadership means to you
2. In which areas do you lead?
3. How did you come to lead in these positions?
4. Why do you lead?
5. What is your working relation with the SMT?
6. Describe the possible barriers or opportunities for you to lead within you school.

APPENDIX 9



Faculty of Education

University of KwaZulu-Natal
Private Bag X01
Scottsville
3209

The Principal

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Dear

I am currently a student at the University of KwaZulu-Natal, Pietermaritzburg. My student number is 992259059. I am presently engaged in a group research project, together with ten other students, which aims to explore teacher leaders in action in schools. Teacher leadership is an emerging field of research in South Africa and I believe that teacher leadership has a powerful role to play in improving the teaching and learning in our 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 in your school, and work particularly with three 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 Supervisor, Ms Callie Grant 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. My contact details are as follows: (039) 7575 606 (W) and (072) 2168 227 (C).

Yours faithfully

Mr Kevin Steven Gunkel



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

.....

.....

APPENDIX 10



Faculty of Education

University of KwaZulu-Natal

Private Bag X01

Scottsville

3209

The Educator

Dear

I am currently a student at the University of KwaZulu-Natal, Pietermaritzburg. My student number is 992259059. I am presently engaged in a group research project, together with ten other students, which aims to explore teacher leaders in action in schools. Teacher leadership is an emerging field of research in South Africa and I believe that teacher leadership has a powerful role to play in improving the teaching and learning in our 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 in your school, and work particularly with three 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 supervisor, Ms Callie Grant 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. My contact details are: (039) 7575 606 (W) and (072) 2168 227 (C). Please feel free to contact me at any time should you have any queries or questions you would like answered.

Yours sincerely

Mr Kevin Steven Gunkel

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

Declaration

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

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

Signature of participant

Date

.....

.....

APPENDIX 11



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 in schools. My name is Kevin Steven Gunkel and I am currently a student at the University of KwaZulu-Natal, Pietermaritzburg (Student No. 992259059). I am presently in a group of 11 students in a research project which aims to explore teacher leaders in action in schools. Teacher leadership is an emerging field of research in South Africa and I believe that teacher leadership has a powerful role to play in improving the teaching and learning in our schools. In this regard I have identified your school as a successful school which exhibits strong leadership at various levels within the institution. I would very much like to conduct research into teacher leadership in your school, and work closely with you, particularly, to extend the boundaries of our knowledge on this concept.

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

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

I am seeking three teachers from your school who:

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

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

My supervisor, Ms Callie Grant 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. My contact details are as follows: (039) 7575 606 (W) and (072) 2168 227 (C). Please feel free to contact me at any time should you have any queries or questions you would like answered.

Yours sincerely

Mr Kevin Steven Gunkel



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

.....

.....



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

28 NOVEMBER 2008

MS. C GRANT (24502)
EDUCATION & DEVELOPMENT

Dear Ms. Grant

ETHICAL CLEARANCE APPROVAL NUMBER: HSS/0755/08

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

"Teacher leadership in action: Collective case studies"

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

Yours faithfully


.....
MS. PHUMELELE XIMBA