

MIDDLE LEVEL TEACHER-LEADERS' STORIES ABOUT SUPPORTS OF AND
BARRIERS TO THEIR LEADERSHIP EXPERIENCES

by

BEVERLY JIMENEZ BURCHFIELD

(Under the Direction of Gayle Andrews)

ABSTRACT

The purpose of this study was to allow middle level teacher-leaders to share their perspectives about the supports of and barriers to their leadership. The researcher wanted to know what middle level teacher-leaders perceived as supports of and barriers to their attempts to act as leaders within their schools. To achieve this purpose there were two research questions that guided this study. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders? By allowing participants to describe and reflect on their experiences, this study identified ways that middle level programs can support teacher-leaders' efforts to act as advocates, innovators, and/or stewards in their schools and ways that middle level programs can minimize the barriers that inhibit teacher-leaders' efforts.

This qualitative study was conducted at a middle school located in Northeast Georgia. The theoretical framework used to guide this study was role theory, which explains the way members define the roles they play in an organization. Five middle level teachers, each with at least seven years of teaching experience, were recruited as participants. For data collection, the researcher interviewed each participant twice and she also kept a field journal to record

reflections and questions that she then shared with the participants during each of their second interviews.

The researcher chose narrative inquiry as the methodological design for this study. She used open-ended questions in both of the tape-recorded interviews conducted with each participant, encouraging them to provide multiple examples and detailed accounts of their experiences. The participants in this study shared stories about their experiences as teacher-leaders and in the retelling identified supports of and barriers to their efforts to lead.

The major findings reported include having funds and resources to support their teaching and leadership endeavors as a significant support or barrier. Additionally, participants shared stories about the influences their site-based and district-wide administrators have on their roles as teacher-leaders. Finally, participants identified “autonomy” (the ability to be trusted and allowed to make the decisions in his/her classroom and in his/her teacher-leadership roles) as being important to their efforts to enact their teacher-leadership roles.

INDEX WORDS: Teacher-Leaders, Middle Level, Middle School, Role Theory, Narrative Inquiry

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DEDICATION

This degree was attained because of the belief and unwavering faith my family provided for me. My mother and father, Anna Jean McDonald Jimenez and Modesto Ocasio Jimenez, who were the perfect models of love, faith, and perseverance and thus taught me to live my life to the fullest, because they always did. My sister, Margaret Victoria Jimenez, who sees me in ways I can only hope are true, gives me the courage to dare and inspires me with her love, faith, decency, and the beauty that God only bestows on the purest of human spirits. My son, Adam William Burchfield, whose mere existence brings such joy and pride to me that if I never accomplished another thing besides being his mother, I would have lived the fullest, most meaningful life I could ever live, has humbled by the sacrifices he made for my dream. Finally, I dedicate this to my husband, John William Burchfield, whose sacrifice, faith, and love make me want to be the best woman and wife possible, because he never gives me less than his best—and he is brilliant, talented, handsome, and destined to be famous.

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CHAPTER 1

INTRODUCTION

“Rather than remain passive recipients – even victims – of what their institutions deal to them, teachers who lead help to shape their schools and, thereby, their own destinies as educators” (Barth, 2001, p. 445).

Who are teacher-leaders? Teacher-leaders are the men and women who are, “adept at influencing constituencies over which they admittedly have no formal authority” (Bowman, 2004, p. 187). Despite what to some people would be the crippling powers of federal mandates and institutional opposition, teacher-leaders forge ahead, sharing and collaborating with their fellow educators, supporting their students, and reaching out to the communities in which they teach. These collegial teachers want, “more than a ‘job’” and to facilitate their experiences they demonstrate responsible, caring professionalism, and provide support and encouragement for their peers (Carr, 1997, p. 241). In fact, to create developmentally appropriate middle schools, *Turning Points 2000: Educating Adolescents in the 21st Century* recommends that middle level teachers participate in school leadership undertaking roles such as team leaders and department chairs, providing support for both their peer teachers and their administrative staffs (Jackson & Davis, 2000).

What are the characteristics of this powerful entity, teacher-leader? Bowman (2004) described the four ways that teacher-leaders typically manage their leadership roles as:

- Teachers-leaders manage the attention of their students, which they do by devising an atmosphere in which students can succeed, and their lessons have a purpose that strikes a chord with their students.
 - Teachers who are adept at turning information into a shared experience lead in the classroom, thus they manage the meaning making that takes place in their classroom communities.
 - Teacher-leaders manage trust. Teachers as leaders must always remember that in a professional relationship, never be the cause of surprise, because doing so inevitably erodes trust, which is inextricably linked to honesty and sincerity.
 - Teacher-leaders need to manage themselves by finding an individual and persuasive voice, an authentic version of them that engages and recruits others.
- (pp. 188-189)

Barth (2001) wrote that “the teacher who leads:”

- Gets to sit at the table with grownups as a first-class citizen in the school house rather than remain the subordinate in a world full of superordinates;
- Enjoys variety, even relief, from the often relentless tedium of the classroom; and
- Has an opportunity to work with and influence the lives of adults, as well as those of youngsters. (p. 445)

Research supports the idea that teacher-leaders are important contributors to the success of their schools (Barth, 2001; Jackson & Davis, 2000; Zepeda, Mayers, & Benson, 2003). This study highlights teacher leaders in middle level schools, which are defined as schools serving young adolescents, those students who are ages 10 to 14. What do middle level teacher-leaders experience? Do their school climates challenge and encourage or stifle and discourage teacher-

leaders? How do their school climates influence efforts to improve their schools' practices? Do middle level teacher-leaders feel their work is valued and appreciated? Do middle level teacher-leaders contribute to the success of the students and schools they serve?

Purpose of the Study

The purpose of this study was to allow middle level teacher-leaders to share their perspectives about the supports of and barriers to their leadership.

Research Questions

1. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?
2. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?

By allowing participants to describe and reflect on their experiences, this study has identified ways that middle level programs can support teacher-leaders' efforts to act as advocates, innovators, and/or stewards in their schools and ways that middle level programs can minimize the barriers that inhibit teacher-leaders' efforts.

Significance of the Study

Research that focuses on the experiences of middle level teacher-leaders is minimal. Although there is a large body of research that focuses on the need for teacher-leaders, most of that research concentrates on teacher-leaders who hold specific, formal leadership roles such as department chair or team leader (Barth, 2001; de Lima, 2008; Harris & Townsend, 2007; Phelps, 2008). There is also research that provides school administrators with suggestions for how to create opportunities for teachers to lead (Barth, 2001; Jackson & Davis, 2000; Petzko, 2004; Zepeda, Mayers, & Benson, 2003). Most of the research that applies to teachers in leadership

roles at the middle level, centers on those more formal roles, e.g., team leader. However, very little research exists that discusses supports of and barriers to teacher-leaders' efforts to lead outside the labeled leadership positions. No research was found that specifically focused on the perspectives of middle level teacher-leaders and what their views are concerning the supports and barriers they negotiate to establish these roles. In fact, research to this point indicates a gap in the literature when discussing supports and barriers to middle level teacher-leadership. Smit and Fritz (2008) studied the effects of supports and barriers on teachers negotiating their roles as teacher-leaders, and they found:

More studies are required focusing on what enables versus disables teachers and how this relates to respective identities, how teachers deal with trauma on a daily basis, and how personal, social, and situational identities drive effective teaching practices. The reality is that the power of the working environment, coupled with the personal and social identity, is a much stronger force in the development of teacher identity than national education policies. (p. 100)

How then, do middle level teachers forge their leadership identities in the face of supports of and barriers to their attempts to lead? What are those factors that positively or negatively influence their attempts to negotiate these roles?

This study addresses these gaps in the literature and reports implications for improvement of middle level teacher-leadership initiatives. Research supports the impact teacher-leaders can have on student engagement and achievement (Barth, 2001; Bowman, 2004; Frost, 2008; Frost & Durrant, 2002). This study is significant because it could provide information about the supports and barriers middle level teacher-leaders encounter. Through understanding these factors, school district personnel, school administrators, community members, and teachers can work together to

overcome the barriers and increase the supports. Since research demonstrates that teacher-leaders are influential in increasing student achievement and improving their schools' culture, then improving leadership opportunities for middle level teacher-leaders will benefit middle level education overall. The findings from this study will include recommendations that could help improve school administrators' leadership skills, which in turn, could benefit their schools as a whole.

Critical Terms

The following terms are defined within the context of the study. These definitions are presented to help the reader understand the meaning of critical terms.

- **Teacher-leader:** A teacher-leader is any teacher who acts as an *advocate*, working to make changes that improve students' learning and students' learning environments; any teacher who acts as an *innovator*, working creatively to make changes that provide new technology and programs that enhance student learning, teacher's professional development, and the overall school climate; and/or any teacher who acts as a *steward*, working to make changes that improve teachers' working conditions. A teacher-leader is any teacher who plays one or more of these roles: an advocate, an innovator, and/or a steward. (Phelps, 2008)
- **Supports:** Any factor that facilitates teacher-leadership opportunities and recognizes teacher-leadership roles as valuable and necessary (Lambert, 2003).
- **Barriers:** Any factor that interferes with a teacher-leader's opportunity to exercise his or her role as a teacher-leader (Barth, 2001).
- **Efficacy:** A teacher's self-confidence and feelings of success in his or her role(s) as a teacher-leader (Frost, 2008).

- Negotiate: A way of explaining one's identity in a societal context by achieving a match between perceptions of self and identity standards through symbolic interaction with others, including the negotiation of teacher-leadership roles (Burke, 1991).
- Formal teacher-leadership roles: Roles identified within a school system that have a description and list of identified duties (Barth, 2001; de Lima, 2008).
- Informal teacher-leadership roles: Roles that teacher-leaders undertake in the negotiation of their identities as middle level teachers and leaders; these include the roles of advocate, innovator, and steward (Phelps, 2008).

Overview of the Research Procedures

This qualitative study was conducted at a middle school located in Northeast Georgia. The theoretical framework used to guide this study was role theory, which explains the way members (also known as *actors*) define the roles they play in an organization (Katz & Kahn, 1966). Data collection began in September of 2011 and ended in December of 2011. Five middle level teachers, each with at least seven years of teaching experience, were recruited as participants. For data collection, I interviewed each participant twice and I kept a field journal to record reflections and questions that I shared with the participants during each of their second interviews.

I chose narrative inquiry as the methodological design for this study. According to Clandinin and Connelly (2000), "...narrative inquiry is a way of understanding experience" and "...narrative inquiry is stories lived and told" (p. 20). Carter (1993) wrote, "The special attractiveness of story in contemporary research on teaching and teacher education is grounded in the notion that that story represents a way of knowing and thinking that is particularly suited to explicating the issues [teachers deal with]" (p. 6). Moreover, Narrative Inquiry provided an

excellent method of extracting participants' reflections on their own ideas about supports of and barriers to their attempts at leadership. Thompson (1999) used narrative inquiry as her methodology in a study and wrote, "Listening to their stories may be informative for understanding the conditions under which teachers work" (p. 48).

I used open-ended questions in both of the tape-recorded interviews conducted with each participant, encouraging them to provide multiple examples and detailed accounts of their experiences. These detailed answers provided rich data, which is one of the benefits of using narrative inquiry as a methodology (Clandinin & Connelly, 2000; Webster & Mertova, 2007). The participants in this study shared stories about their experiences as teacher-leaders and in the retelling sometimes worked out a problem through the experience. "Just as a story unfolds the complexities of characters, relationships and settings, so too can complex problems be explored in this way" (Jonassen, 1997, p. 72). Narrative inquiry allowed my participants to reflect and resolve issues within the context of this study.

Organization of the Dissertation

Chapter 1 provides the background and purpose of the study, states the research questions, discusses the significance of the study, defines critical terms, and gives an overview of the theoretical framework and methodology. Chapter 2 contains a review of the related literature on the topics of narrative inquiry, role theory, the background of middle level education, teacher-leaders, and supports of and barriers to teacher-leadership. Chapter 3 describes the research method. Chapter 4 provides the data analysis and findings from the study. Chapter 5 presents a summary, discussion, and implications based on the findings of this study.

CHAPTER 2

THEORETICAL FRAMEWORK AND LITERATURE REVIEW

Introduction

The purpose of this study was to examine middle level teachers' perspectives about the supports of and barriers to their efforts to be teacher-leaders. The guiding research questions were

1. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?
2. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?

Using a qualitative approach that included open-ended interviews guided by narrative inquiry as the methodology, the participants shared their stories of supports and barriers they have encountered while trying to fulfill their roles as both formal and informal middle level teacher-leaders.

The chapter begins with a review of the pertinent literature. After introducing my theoretical framework, I provide some background information about middle level education necessary for situating the context of middle level teacher leadership. Next, I examine the literature surrounding teacher-leadership and the supports and barriers that facilitate or hinder teacher-leaders' development. Finally, this chapter concludes with a discussion of the gaps in the literature and the ways in which this study attempted to address some of those gaps.

Theoretical Framework

The theoretical underpinnings that guided this study are found in role theory. The origins of role theory are traced back to the works of the sociologist George Herbert Mead (Crotty, 2006). According to Mead (1934), we “see the world as a whole,” by developing our concepts of “Me” as an individual based on societal definitions of ourselves (p. 134). Mead (1934) posited we develop this ability socially by, “entering into the most highly organized logical, ethical, and aesthetic attitudes of the community” (p. 336). Once we recognize “the most extensive set of interwoven conditions that may determine thought, practice, and our fixation and enjoyment of values” (Mead, 1934, p. 137), we understand who we are as individuals by how our society defines us, i.e., by the role society assigns to us.

Another scholar, Peter J. Burke (1991), expounded on the theory for explaining one’s identity as being based on a societal context. According to Burke (1991), an “...identity is a set of ‘meanings’ applied to the self in a social role or situation defining what it means to be who one is” (p. 837). Moreover, Burke (1991) asserted, “Achieving a match between perceptions of self and identity standards may involve extensive negotiations and symbolic interaction with others...” (p. 839). As such, teachers who choose to lead may take their cues for how to enact leadership roles and define their teacher-leader identities from the school culture in which they teach.

In this study, participants were asked to identify and discuss supports of and barriers to their roles as teacher-leaders working within society’s system of public schools. Consequently, role theory proved a useful lens through which to interpret the data as the participants presented them. At the crux of their roles as middle level teacher-leaders, these participants defined, shaped, and negotiated their roles based upon the discourses, structures, and policies of their

schools' and school systems' cultures and their interactions with other stakeholders in their schools and school systems. Because of their first-hand experiences working in middle level school contexts, they were able to tell the stories, or narratives of the supports and barriers public school systems created for them as teacher-leaders in their middle level school settings.

Role theory

In 1966, Katz and Kahn wrote a book that described how role theory explains the way members (also known as *actors*) define the roles they play in an organization. Particularly, they described how members who become leaders or change agents in an organization develop an understanding of their roles based on cues sent and received from the existing system within an organization, other members in the organization, or even cues that these change agents give themselves. According to Katz and Kahn (1996), role theory has four components—role expectations, sent role, received role, and role behaviors. They defined these components in the following way:

Role expectations, which are evaluative standards applied to the behavior of any person who occupies a given organizational office or position; sent role, which consists of communications stemming from role expectations and sent by members of the role set as attempts to influence the focal person; received role, which is the focal person's perception of the role-sendings addressed to him, including those he sends to himself; and role behavior, which is the response of the focal person to the complexity of information he has received. (Katz & Kahn, 1966, p. 182)

While my study purposefully veers away from focusing on traditionally labeled leadership roles as identified within most school systems, such as department chair, my study participants often began their descriptions and discussions about their leadership activities in the language of

traditional roles as established or experienced in their middle school. Once I introduced the idea that any acts of advocacy, innovation, or stewardship, whether traditionally role-defined or not, were valid subjects for their narrative descriptions, the participants opened up about ways in which they themselves defined their roles as middle level teacher-leaders. Katz and Kahn's explanation of the four concepts of role theory (role expectations, sent role, received role, and role behavior) became useful as the lens my participants used to explain their perceptions of supports of and barriers to their attempts to be teacher-leaders. For example, one participant described how his suggestions for ways to improve communication between the school's faculty and administration was first met with what he perceived as harsh criticism, which affected his feelings of efficacy, or perceived role, and, in his own words, made him feel "unsafe" about sharing ideas aloud in faculty meetings.

In 1986, Biddle discussed developments in role theory and paid particular attention to the differing perspectives on role theory. After reviewing each of these perspectives, he shared an important tenet of role theory when used as a theoretical framework by saying:

...role theory may be said to concern itself with a triad of concepts: patterned and characteristic social behaviors, parts or identities that are assumed by social participants, and scripts or expectations for behavior that are understood by all and adhered to by performers. (Biddle, 1986, p. 68)

The participants in my study found themselves describing barriers to their leadership roles in the terms of "scripts or expectations" that are often "adhered to" by others in the school and school system, but that they, as middle level teacher-leaders, perceive as threats to their leadership. For example, one participant described how she battles against system-wide mandates that discourage field trips even though the administration has admitted that her rationale and

supporting evidence for conducting field trips are strong arguments. The initiative this teacher-leader took was supported by her administration but was defeated by school system funding issues that limited opportunities for field trips. In this sense, her efforts to act as an innovator by bringing real-world curriculum into her standards-based classroom are dissuaded by budgetary concerns outside of her or her administration's control. However, her attempts to bring innovative methods of instruction to her students did not go unappreciated by her administration. Teachers who are negotiating their identities and roles as teacher-leaders often struggle with challenges outside of their and their school administrators' control.

Kaufman and Johnson (2004) published an intriguing role theory study that informed the development of my interview protocol. I wanted to think about how to best phrase interview questions that would facilitate trust between us and encourage them to open up about both their positive and negative teacher-leadership endeavors. Their study revealed that research on gay and lesbian romantic relationships emphasizes the, "self-affirming aspects of relationships" but the research tends to ignore the difficulties homosexuals have negotiating their roles among their heterosexual friends, family members, and coworkers (Kaufman & Johnson, 2004, p. 814). Kaufman and Johnson allowed their participants to describe the "symbols" provided by heterosexual members of their lives. For example, a participant in their study described having a heterosexual friend who never asks after the well-being of the homosexual participant's life partner, but in his/her presence inquires about the well-being of someone else's heterosexual life partner. The act of inquiring after the well-being of the heterosexual participant's life partner but ignoring the homosexual life partner's well-being is symbolic of the discomfort heterosexual friends may experience when in a social situation with their homosexual friends. Additionally, some of the homosexual participants in Kaufman and Johnson's study described examples set by

other homosexuals at their workplaces that provided them with cues or symbols of how to enact their homosexual identities. For example, one participant described being hired by another homosexual and learning that his new employer did not discuss nor reveal his sexual preference at work. Therefore, the study participant also did not reveal his homosexuality to anyone at work. I realize from the examples in this study that the work environment at the school where my study's participants teach may greatly influence their negotiations of their teacher-leadership roles. This study also provided me with much food for thought in terms of the ways I could create interview questions that allowed my participants to share conversation clues/symbols/cues that they identified as helping them understand their roles as middle level teacher-leaders. Kaufman and Johnson's study also helped me think about prompting my participants to discuss their perspectives about each perceived barrier and support that they identified in their own words, with details that allowed me to understand why they saw each experience as supportive or non-supportive.

A 2007 study described the approaches to teaching that instructors in a nursing preparation program play in creating both professional and unprofessional behaviors in students who were negotiating their identities as future nurses. The researchers, Rees and Knight (2007), found that the student nurses participating in the study generated and negotiated, "meaning [about professionalism] through interactions with others [instructors]" in their medical school (p. 125). Moreover, Rees and Knight (2007) found that the participants' behaviors exhibited were "defined within the context of socially created rules and culture" (p. 126). If an instructor taught his or her classes and clinical practicum by emphasizing his/her confidence in the students' professionalism, then the more professional the students' behaviors were. Similarly, this self-fulfilling prophecy worked against students taught by instructors who constantly gave rules to

them for avoiding unprofessionalism. In my study, all of the participants addressed either positive, supportive, and inspiring people who facilitated their roles as teacher-leaders, or shared narrative accounts of negative role models or naysayers who acted as barriers to their leadership endeavors.

Additionally in 2007, Stryker wrote about the connections between one's identity and one's personality related to organizational roles. Of particular interest to my research, Stryker wrote about the ways people can actually overcome set roles that pre-exist in organizations prior to when they became members. I was interested in Stryker's findings and in how he described those results in relation to a person's actions that allowed him/her to individualize a role s/he played in an organization. Stryker (2007) wrote, "I am persuaded that traits as well as roles can serve to define and organize identities, override role expectations, be more salient than specific role identities, and underwrite multiple identities" (p. 1096). Stryker (2007) also described the conflict that may arise within a person when s/he is forced into a social role that conflicts with his/her personal traits, such as how being asked to "keep secrets" might be difficult for a person who is inherently open and forthcoming (p. 1100). My research mirrored this study's findings almost identically, as all of the participants in my study at some time shared their struggles with negotiating their teacher-leadership roles and the expected norms of their school, while also balancing and negotiating their teacher-leadership roles with their own personalities.

In 2008, Ray wrote, "...people are creative agents who continually adjust their behavior in response to the interpretations they make in regard to their circumstances" (p. 1658). He described how teachers develop their leadership identities by writing, "...that actions are the result of a dynamic tension between teachers and their environments" and teachers' develop their professional identities because of their personal experiences, as well as the "social, cultural, and

institutional environment” in which they work on a daily basis (Ray, 2008, p. 1659). During my study, my participants described in varying degrees who and what influenced the development of their leadership qualities, and they described the experiences that shaped their identities the most.

For the benefit of my own work, one of the most important studies was published in 2008 by Smit and Fritz, and explored how to understand teacher identity from the perspectives of two South African teachers. Their study’s participants described why they made the decisions they were making in relation to the cues they were receiving from the other actors in their school. While studying how two South African teachers developed their teacher identities by reflecting on their teaching authority, their desire to stay or leave the profession, and their abilities to multitask, Smit and Fritz (2008) found the following to be true:

...the focus is on the subjective experience of an individual (the social actor) as the basis for understanding and studying society, or a system of society, such as the education system. People (including teachers) interact socially and adjust behavior in response to the actions of one another. As people interpret actions of others, so they adjust their own actions and behavior. (p. 92)

Smit and Fritz (2008) found that their participants identified themselves as teachers based upon how others from their school defined that role. The school’s culture actually identified the characteristics of a teacher in that setting, and the school’s faculty, staff, administration, students, and community members further contributed to the delineating of those characteristics. This study informed how I allowed and encouraged my participants to describe from their perspectives what it means to be teacher-leaders. Smit and Fritz (2008) found,

The main conclusion that we can draw is that teachers forge professional identities that reflect their place of work (social identity) *more so* than their education or level of

qualification (personal identity). ... More studies are required focusing on what enables versus disables teachers and how this relates to respective identities, how teachers deal with trauma on a daily basis and how personal, social, and situational identities drive effective teaching practices. The reality is that the power of the working environment, coupled with the personal and social identity, is a much stronger force in the development of teacher identity than national education policies. (p. 100)

Depending on the school's culture, teacher-leaders will likely feel supported or feel hindered in their attempts to enact their leadership roles.

In 2009, Allen investigated how beginning teachers transitioned from the theory they learned at the university to applying that theory to their practice during their first year of teaching. In that study, he focused on "...the active input of ... teachers as they articulate their experiences and perceptions of their teacher education programme" (p. 169). I asked my participants to articulate their experiences in their roles as teacher-leaders. In Allen's study, the novice educators learned how to mesh theories they had learned in their education programs with practices in the classroom by interacting with the "actors" in their schools' communities. Those actors included peers, students, administrators, district school board members, and parents. My study's participants described how their roles as teacher-leaders were either supported or impeded by relationships with all the other "actors" in their schools' communities.

Finally, Smit, Fritz, and Mabalane (2010) examined how teachers searched for their professional identities and described the complexities teachers face when trying to define their professional roles, in their schools and specifically in their classrooms. Additionally, Smit, et al. (2010) used interview techniques that allowed their participants to describe their experiences with negotiating their professional roles through conversations or narratives. I, too, interviewed

my participants and asked them to share stories describing their perspectives on supports of and barriers to their ability to negotiate successful teacher-leadership roles. Smit, et al. (2010) wrote, “Conversational data speak to the heart of what it means to be a teacher in the current educational landscape, a theme of multiple roles of being a teacher” (p. 102). Moreover, Smit, et al. (2010) found that teachers had varying degrees of success negotiating their roles, based largely on the supports or hindrances they encountered within their individual schools. For example, one male teacher in their study wondered if he was successfully teaching his students because he felt inadequately prepared in that content area. Additionally, a lack of resources had him questioning whether he was serving his students best. Conversely, another participant in the study receives her school community’s support and therefore,

Even though she is confronted by a community perceived as declining socially and economically, her identity is energized by her involvement in multiple tasks for which she receives acknowledgement within the school community. She utilizes the resources at her disposal optimally and as such...is integrated and empowered. (Smit, et al., 2010, p. 103)

Their findings further support and frame my participants’ experiences as authentic role negotiations, dependent upon each participant’s interactions with other “actors” in his/her setting.

Section Summary

Role theory provides a framework for research aimed at helping participants in studies, and for the researchers conducting these studies; role theory allows them to find connections between the participants’ experiences and the societal cues that shape those experiences. In this study, I do not use a traditional role theory frame because my participants are describing their

perspectives according to the many roles they juggle in their efforts to advocate, innovate, and steward as middle level teacher-leaders (Phelps, 2008). Even so, the basic tenets of a role theory framework are used in my analysis and thinking about the descriptions of my participants' experiences and perspectives regarding being middle level teacher-leaders. Additionally, my participants were encouraged during the open-ended interviews to tell their stories. I use narrative inquiry to guide my methodology since it allows participants in a study to share experiences and stories in a way that encourages self-reflection and discovery, which in turn leads to making meaning out of life's events and how these events shape the roles that people enact. The research questions in this study were continually revisited with the participants, resulting in several examples of experiences that produced rich data for the analysis.

The following section begins with a contextual piece, providing background on middle level education and explaining how this study will fill the current gap in the literature about middle level teacher-leaders. Finally, this chapter will review literature that provides background about teachers as leaders.

Middle-Level Education

Philosophy

For many years in American education, one group of students has been periodically marginalized, misunderstood, and underserved: young adolescents, students ranging in age from 10 to 15 years old (Lipsitz, 1977; Ohanian, 1999; Vars, 2000). The junior high school model, with its reliance on departmentalization and rigidity in keeping with its high school namesake, has existed as the main means for educating young adolescents in American schools since 1910 (Lounsbury & Vars, 2005). The first person credited with using and advocating the term *middle school* was William Alexander in 1963 (Alexander, Williams, Compton, Hines, & Prescott,

1969). Recognizing that 10- to 15-year-olds may be taught in a variety of school settings, the National Middle School Association (now the Association for Middle Level Education) uses the term *middle level* to describe educational programs for young adolescents (National Middle School Association, 2010).

A central question to understanding the philosophy of middle level schools is addressed in *Turning Points 2000*: “What is the purpose of middle level education?” (Jackson & Davis, 2000, p. 10). Jackson and Davis (2000) answered their own question with a purposefully direct response: “The main purpose of middle level education is to promote young adolescents’ intellectual development” (p. 10). Jackson and Davis acknowledged that many critics of middle level schools stereotype adolescents as creatures with raging hormones and little capacity for meeting intellectual challenges, but they argue that, young adolescents need rigorous academic challenges provided through a variety of instructional strategies geared towards meeting the needs of each individual student.

In the National Middle School Association’s 2010 foundational document, *This We Believe: Keys to Educating Young Adolescents*, the Association advocated for essential attributes and characteristics of an education for young adolescents. According to this seminal work, middle level schools must be:

1. Developmentally responsive: using the distinctive nature of young adolescents as the foundation upon which all decisions about school organization, policies, curriculum, instruction, and assessment are made.
2. Challenging: ensuring that every student learns and every member of the learning community is held to high expectations.

3. Empowering: providing all students with the knowledge and skills they need to take responsibility for their lives, to address life's challenges, to function successfully at all levels of society, and to be creators of knowledge.
4. Equitable: advocating for and ensuring every student's right to learn and providing appropriately challenging and relevant learning opportunities for every student. (p. 13)

Why do middle level students need teacher-leaders?

One of the ways middle level teachers provide active, purposeful lessons for young adolescents is by demonstrating what it means to be an active participant in leadership endeavors, as well as taking a leading role in one's own education. When teachers participate in learning activities, collaborating with their middle level students on creating the learning community, they demonstrate for their students how to achieve and "lead them in understanding the benefits of democratic processes" (National Middle School Association, 2010, p. 17). Middle level teacher-leaders can aid in this effort by sharing their specialized knowledge of teaching and serving young adolescents as evidenced in the statement:

Effective leadership is the linchpin of a school's success. All those who serve as school leaders—whether administrators, teachers, or other staff members—must possess a deep understanding of the young adolescents with whom they work and the society in which they live. . . . These leaders understand the complete spectrum of young adolescent development and use that knowledge to create middle grades programs that address the unique needs of these students and advance their learning and growth. (National Middle School Association, 2010, p. 28)

Additionally, middle level teacher-leaders can educate parents, policymakers, and community members about the educational, developmental, emotional, and social needs of young

adolescents. Middle level teacher-leaders have the opportunity to be innovators by challenging and changing practices “that do not serve students’ best interests and confront issues not in line with the vision [of middle level education]” (National Middle School Association, 2010, p. 29).

Middle level teacher-leaders may choose to advocate for better learning conditions for their young adolescent students. Middle level teacher-leaders may also lead their community by pioneering innovations in instructional strategies within their classrooms and sharing their successes with other educators. Additionally, middle level teacher-leaders may steward professionalism among their peers by choosing to be ethical, dedicated model teachers.

Section Summary

Middle level teacher-leaders have the opportunity to forge positive relationships with other teachers, administrators, parents, staff members, community members, and of course, their students. By demonstrating through their leadership the importance of building meaningful relationships with students, these teacher-leaders provide the foundation they need to build positive emotional, social, and educational relationships within their middle level school.

Summarily, “Middle school educators have long recognized an essential truth about children’s learning: relationships matter. For young adolescents, relationships with adults form the critical pathways for their learning” (Jackson & Davis, 2000, p. 121).

Teacher-leaders

How do teacher-leaders contribute to schools?

Literature that discusses the ways in which teachers lead in their schools is rich with recommendations describing how to create opportunities for teachers to lead and the inherent benefits to the school system when teachers do lead (Barth, 2001; Bowman, 2004; Lambert,

2003; Phelps, 2008; Zepeda, Mayers, & Benson, 2003). The literature provides examples of why creating environments that encourage teachers to be leaders in schools is beneficial.

One area of school culture in which teacher-leaders are making an impact involves curriculum changes. In their article, Kirk and MacDonald (2001) wrote about the impact teacher-leaders made on developing a new curriculum for a health and physical education program currently used district-wide. According to their findings, "...teachers made an invaluable contribution to the curriculum reform process [and] were also involved, inevitably, in some degrees of transformation of the innovative messages of the reform materials" (Kirk & MacDonald, 2001, p. 552). Furthermore, the teachers used their knowledge of their school's students' needs, their school's work conditions, and their school's resources to make informed decisions about how to extrapolate the most important idea embedded in the reform's materials. The teachers who advocate for better curriculum in their classrooms determine the success of curriculum reform. Kirk and MacDonald's (2001) study indicated that teachers who are involved in decisions about curriculum reform, and teachers who are authors of broad curriculum changes, are more likely to teach the material enthusiastically, thus benefitting their students. When the teachers who teach the curriculum use their leadership to co-author that curriculum, it provides an authenticity that no other participant can provide.

Teacher-leaders are a necessary component for a school's success (Barth, 2001; Carr, 1997; Frost & Durrant, 2002; Hatch, Eiler White, & Faigenbaum, 2005). In their article on the impact of teachers as leaders, Frost and Durrant's (2002) research shows that "teachers have enormous potential to contribute to organizational learning" (p. 153) and "can help to build new organizational strategies which may have a lasting effect" (p. 154). They described the positive

results that occur when teachers participate in developing and sharing their ideas and how these ideas contribute to changes that improve their school's culture when they said:

...the more individual teachers are able to exercise leadership and professional judgment, the more the school develops the conditions that favor change and improvement.... With improvements in information and communication technology there are increasing opportunities for teachers to contribute to wider professional and policy discourse. (Frost & Durrant, 2002, p. 155)

Frost and Durrant's findings confirm the idea that, when teachers lead they provide positive energy and growth within a school's culture. When teachers have opportunities to lead, their self-efficacy increases and this newfound confidence can prompt them to take part in creating policy changes that affect entire school systems. This article helped underscore my participants' descriptions of opportunities they have had in making changes in their schools' or school systems' policies.

Within her article on redefining teacher-leadership, Lambert (2003) proposed that through reflective dialogue adults challenge their own ideas about the world and develop respect for thinking that diverges from their own. She wrote, "Leadership is a process that occurs within the minds of individuals who live in a culture" and that this process allows the participants to "create stories, understand stories, and appreciate their struggles through these stories that they tell to others within their culture" (Lambert, 2003, p. 424). Consequently, these conversations among teachers provide a context from which all teachers can grow, learn, and mentor and help them strengthen themselves as teacher-leaders in their own right. Finally, Lambert (2003) asserted that teacher-leaders share "a few common elements: shared intention, search for understanding, remembering and reflecting on beliefs and experiences, revelations of ideas and

information, and respectful listening” (p. 426). As noted in previous literature, teacher-leaders are good listeners—“respectful” listeners, according to Lambert’s research.

Lambert (2003) advised administrators and school systems on ways to make teachers comfortable with leadership roles, so teachers are

- Approaching every colleague as a valued contributor;
- Viewing teachers as experts;
- Creating forums for sharing, dialogue, and critique;
- Turning ownership of learning over to the learners;
- Situating learning in practice and relationships, providing multiple entry points into learning communities, adopting an inquiry stance;
- Sharing leadership; and
- Rethinking professional identity and linking it to professional community. (p. 427)

Lambert also described the importance of teachers mentoring other teachers as part of creating teacher-leaders with strong voices. She stressed:

When mentors express deep beliefs in our capacities, we tend to become more of the person we are perceived to be. The mentoring process can develop efficacy in problem solving and decision making, offer both support and challenge, and facilitate a professional vision. Teacher-leaders mentor others into leadership. (p. 427)

Lambert continued by elaborating on the fact that mentor teachers can actually encourage new teachers to remain passionate about their teaching, which may aid them in becoming future leaders. By continually praising new educators for risks they take and successes they experience, mentors can help keep new teachers’ passionate commitment alive. This will encourage new

educators to take on teacher-leadership roles earlier in their careers, than if they did not receive this support. Lambert suggests that both veteran teachers and novice teachers benefit by keeping one another inspired during the mentoring process.

In her article on middle level teachers and the roles they play as leaders in their schools, Petzko (2004) described the importance of allowing teachers to have leadership roles and opportunities to contribute to school policies affecting young adolescents' education. When teachers have a voice in school-wide decisions regarding curriculum and instruction of young adolescents they feel vested and are more likely to stay in their profession. To this end, Petzko (2004) urged schools to listen to middle level teachers because their experiences reflect an understanding for "issues of power, authority, and influence," and they use that understanding to advocate for their adolescent students (p. 83). Moreover, Petzko (2004) stressed the need for middle level teachers to be allowed to work in teams to "apply effective models of decision making" and cautions teachers working in teams to "be cognizant of their own leadership styles and strengths as well as those of the team with which they work" (p. 84). Teams within middle schools provide a natural stage for teachers to practice using their leadership skills to positively influence local policy, influence curriculum, and improve student-learning conditions.

Harris and Townsend (2007) discovered that teacher-leadership is the number one contribution to successful school improvement. . As far as building the capacity for sustained school improvement, Harris and Townsend also found, "the practices of teachers engaged in leading innovation and change within their classroom, subject or school" to be implicit (p. 170). In addition, teacher-leaders were the most influential factor for continued and sustained school improvement. Teacher-leaders are the main drivers of continued positive change. Based on their data, Harris and Townsend discovered four levels that teacher-leaders who are given forums for

sharing their ideas can directly affect with their work: “individual development for teachers, development for their colleagues, whole-school development, and student achievement” (p. 172).

When teachers have opportunities to lead within their school communities, the entire school reaps the rewards. In fact, when teachers have the opportunity to experience staff development together and time to share reflections from those experiences the learning is more likely to translate into classroom teaching practice. Taking these ideas a step further, research reveals, “that where teachers are given the opportunity to lead, however early in their career, a great deal can be achieved for the benefit of schools and young people” (Harris & Townsend, 2007, p. 175). A few of the teacher participants in a program entitled, “Developing Leaders” (2007) had the following to say about their experiences with leadership opportunities:

Developing Leader 13 stated, “I believe that developing leaders has increased my confidence and widened my knowledge on teaching and learning in schools. It has given me valuable leadership skills.” Developing Leader 44 stated, “It has given me the confidence to move forward with ideas, particularly in assessment for learning.” (p. 172)

Giving teachers the opportunity through programs to develop and exercise their professional leadership skills directly impacts both students and schools.

Martin (2007) wrote about the qualities a teacher needs to possess to become a teacher-leader and that can make him or her invaluable at solving school-wide problems. She stated, “Teacher-leaders are problem solvers who acknowledge an issue or problem and contemplate a variety of solutions” (Martin, 2007, p. 17). A teacher-leader whose voice is strong has credibility and expertise. This same teacher-leader relates well to others and solves, instead of lamenting problems (Martin, 2007).

Another researcher who described the positive influence and impact teacher-leaders have upon school cultures is Jorge Avila de Lima. According to de Lima (2008), teacher-leaders have “interpersonal influence among colleagues” (p. 162). For example, when teachers exhibit their leadership prowess they encourage peers to try new ways of approaching the art of teaching, and they provide examples of risk-taking’s potential payoffs. Even if a teacher-leader takes a risk and fails, he or she may inspire others to jump in and help analyze why the original idea did not work.

Next, de Lima (2008) described the importance of teacher-leaders being at the forefront of seeking meaningful professional development training. He stated,

Teacher-leaders work with colleagues to shape school improvement efforts and take some lead in guiding teachers towards a collective goal. In short, one way that teachers become leaders is when they influence their colleagues’ professional development and practice and when they are regarded by these colleagues as influential and are allowed to lead by them. (de Lima, 2008, p. 165)

Teachers influence fellow educators by interacting with their colleagues on all levels.

Professional development, developed by the professionals who will participate in it, has clarity of purpose easily accepted by those involved.

Hanson and Moir (2008) wrote an article about mid-career teachers who left their profession for one year to train and become mentors for other teachers. They would mentor both new and mid-career teachers for three-year periods, not having any classroom duties as individual teachers themselves. Then, at the end of the three-year period, they would return to the classroom as teachers where their newfound confidence as leaders would emerge and play out in different ways.

Hanson and Moir (2008) described the impacts these teachers can have on the practice of their colleagues and schools:

Upon returning to work as teachers, leaders, and colleagues, former mentors have played leading roles in cultural shifts in their schools that encourage distributed leadership and the development of adult learning communities focused on reflective conversations about teaching and learning. (p. 458)

Hanson and Moir (2008) also indicated that these teacher mentors bring, “deliberate, ongoing learning” into their school cultures, which resonates positively for teachers and students alike (p. 458). Many teachers may feel inspired by the enthusiastic invigoration of a few teachers who demonstrate the level of professionalism and dedication these former mentors demonstrated.

In their research on the Teachers Network Leadership Institute’s (TNLI) initiative, created to bring the voices of teachers into the arena of educational policy by using action research in the classroom, Rust and Meyers (2006) found teachers’ voices could have a powerful impact on policy-making. While participating in the study, the classroom teachers implemented action research to improve the practice in their classrooms. The results were impressive as “over a third of the teachers claimed to have implemented new strategies and to have improved student achievement” (Rust & Meyers, 2006, p. 82). By performing their own research and by participating in reflection groups that discuss colleagues’ action research, teachers in the TNLI used their voices and heard other educators’ voices to the benefit of all concerned. Some of the specific areas the teachers identified as improving included, “initiating program changes, providing new opportunities for students, improving relationships with students, and strengthening opportunities for student advocacy” (Rust & Meyers, 2006, p. 82).

Additionally, teachers were pleased because they involved, “parents and families in their research and they were able to communicate clearer and higher expectations” (Rust & Meyers, 2006, p. 82). Likewise, teachers involved in Rust and Meyers’ (2006) study found they were helpful in improving district-wide professional development because they were comfortable exercising their leadership to reflect on experiences and recommend desirable changes. In fact, “ten percent of the teachers claim to have brought about policy changes at the school or district level” (Rust & Meyers, 2006, p. 83). In some cases, the impacts on policy-making have been far reaching. For example, “California has expanded its Beginning Teacher Support Program to reach all new teachers throughout the state” based on the action research findings of one of the teacher participants (Rust & Meyers, 2006, p. 83). Summation of this six-year study provided evidence that those teachers who participated in the study could become powerful instruments of positive influence. The contributions they make in the areas of student achievement, professional development, family/community involvement, and school cultures can have a valuable impact on the entire system of education.

Middle level students benefit from strong teacher-leaders, especially those who act as advocates on behalf of their students. For students to witness their schools operating democratically, students should see their teachers take on school-wide responsibilities, thus creating a school culture that does not exist under the “dictatorship” of one leader (Barth, 2001). Studies support the findings that students benefit from teachers’ leadership in other ways as well such as,

...in high-performing schools (those with few discipline problems and high pupil achievement), decision making and leadership are significantly more democratic. The

teachers are more involved and influential in establishing discipline, selecting textbooks, designing curriculum, and even choosing their colleagues than are teachers in low-performing schools. (Barth, 2001, p. 445)

Students believe in the ideas of democracy and advocating for change when they observe their teachers doing so.

Timperley (2008) stated that one benefit to encouraging the development of teacher-leaders is that it, “has the potential to achieve instructional improvement” through joint collaborations between teachers, administrators, and other stakeholders within a school (p. 830). Therefore, when leadership focuses not on the person or people leading but instead shares efforts to complete tasks, instructional leadership takes the form of teaching and learning and positively influences student outcomes. Finally, teacher leadership creates schools with more staff members who are, “knowledgeable about and take responsibility for the improvement of educational outcomes” (Timperley, 2008, p. 831). I learned from my participants whether they feel they have an important stake (and voice) in the instructional decisions made in their school, or if they believe their input is not welcomed in making those decisions.

Alma Harris (2007) wrote, “where teachers share good practice and learn together, the possibility of securing better quality teaching is increased” (p. 316). Therefore, empowering teachers leads to improved student performance and positive developments and changes within organizations. Going into my study, I was curious to learn whether my participants would agree with this line of thinking.

Additionally, the entire school benefits from strong teachers exercising leadership. For example, the school benefits from the additional counsel of teachers who speak up about school-wide decisions. “Teachers who assume responsibility for something they care desperately

about—for example, a school’s staff development day—stand at the gate of profound learning” (Barth, 2001, p. 445). The “gate of profound learning” is reached when teachers take control of their own professional learning and once in control, they choose the topics that will have the greatest impact on their roles as classroom teachers and teacher-leaders. Teacher leadership also affects teachers’ commitment to teaching. When teachers feel their voices matter and they have part of the ownership in decision making, their morale is greater and they are less likely to leave the profession (Barth, 2001), thereby benefitting the students and the schools.

Another benefactor of teachers with strong leadership skills is the principal of the school. Bearing the incredible pressure exerted on administrators to lead their schools’ efforts to improve, including increasing student achievement, their best source of expert advice is the professionals teaching in the classrooms. Not only are teacher-leaders reliable resources, they are nearby and in touch with the school’s climate. Wise principals encourage and leverage teachers’ leadership to the benefit of their own (Barth, 2001).

In 2003, Zepeda, Mayers, and Benson wrote about the benefits for principals in middle level settings who share decision making with their teachers. They described what they found:

Principals affirm teachers when they empower them as decision makers. For teachers, having one’s input requested, or, even more powerfully, *expected* in the decision-making process signals to teachers that their expertise and experience are *valued* and *needed*. Student issues, hiring decisions, and outreach initiatives all provide opportunities for teachers to become leaders and to stay in the classroom *at the same time*. (p. 74, emphasis in the original).

This topic was one I asked my participants to explore during their interviews because I was curious about the teacher-leadership experiences they had while working with various school administrators at the middle level.

In 2004, Zepeda wrote about the importance of encouraging teachers to be leaders. In fact, she urged school administrators as well as district administrators to embrace teacher-leaders as a means for building strong school cultures when she stated:

Teacher-leaders are critically important in shaping the school culture, and they are the ones who ignite the torch. A positive school culture is one in which teacher-leadership is the norm and the principal supports and nurtures teachers to assume expanding roles as leaders. Principals who empower teachers to be leaders build strong school cultures.

(p. 47)

I was curious to learn whether or not my participants considered taking on teacher-leadership roles in a middle level setting if the school administrators did not nurture the teachers' attempts to lead.

Finally, the teachers themselves benefit tremendously from engaging in conversations with one another. The teacher who leads:

- Gets to sit at the table with grownups as a first-class citizen in the schoolhouse rather than remain the subordinate in a world full of superordinates;
- Enjoys a variety, even relief, from the often relentless tedium of the classroom;
and
- Has an opportunity to work with and influence the lives of adults, as well as those of youngsters. (Barth, 2001, p. 445)

Grubb and Flessa (2006) found that when the school's vision represents a consensus among all staff members, conflicts are minimized because there is an "allocation of the responsibilities between teachers and principals," (p. 532). Additionally, Grubb and Flessa discovered that principals who allowed teachers to have as much input and as many leadership roles as possible saw the biggest gains in their students' growth and achievement. As one principal stated, "This is a profession where if you don't talk to one another, if you don't problem solve together, and if you don't put your creative minds together, you get nowhere" (Grubb & Flessa, 2006, p. 533). Yet another benefit Grubb and Flessa discovered is that in schools with several teacher-leaders who regularly communicate with all of their peers, teachers have a greater understanding of what administrators deal with thus, "reducing the barriers between teachers and administrators" (p. 536). As a result, morale at such schools is higher because teachers feel they play an integral role in creating the atmosphere, vision, and direction for their schools.

Finally, Grubbs and Flessa (2006) found a powerful benefit for schools when teacher-leaders have input into the hiring of a new principal, and teachers take ownership for the process of selecting like-minded administrators to co-lead with them. For this reason, there is seldom dissension among faculties and their new administrators in schools with large populations of teacher-leaders (Grubbs & Flessa, 2006). Grubbs and Flessa's study proved helpful when I asked my participants questions about their respective relationships with past and present administrators. Without prompting, many participants shared supports of and barriers to their leadership experiences that different administrators have provided or introduced.

The literature clearly supports the need for middle level teacher-leaders. The benefits to school communities include increased student achievement, teachers' efficacy, meaningful,

effective professional development, pro-active teachers, group problem solving, better curriculum development, and increased support for school administrators.

How do teachers become leaders?

The literature clearly supports the notion of teachers as leaders. How, then, do teachers become teacher-leaders? For starters, the best teachers lead by following. In other words, when they hear about another teacher's innovative or exciting instructional strategy, teacher-leaders cannot wait to try it out in their own classrooms and share the experience. Teachers also demonstrate leadership when they join school and district committees and teams, which is an example of leading by following. They realize they will carry greater strength when they work together, first in small groups, then with the support of those groups they can improve their entire school's community. Another way that teacher-leaders set themselves apart is by opening up their classrooms to peer observations. By working hard every day to improve their practice, teacher-leaders not only share their craft but they also open themselves up to honest criticism. While making themselves vulnerable, they encourage others to follow their example and the obvious benefits of collegiality garner them respect. People are more willing to listen to someone they know has listened to and sought feedback and guidance from other professionals themselves. Barth (2001) noted that the mark of a true teacher-leader is someone who listens first before taking action (Barth, 2001). Peer observations and the rich conversations that follow provide opportunities for teacher-leaders to listen and then take action.

Another author who talked about the importance of teacher-leaders inviting constructive criticism and being good listeners was Carr. In 1997, she wrote an article listing the steps teachers need to take to become teacher-leaders:

- Take responsibility both for their own growth and for instructional goals in their classrooms;
- Encourage rather than denigrate their colleagues who are passionate and motivated;
- Educate outside their classrooms eager to share what they know with their community as well as with their colleagues
- Have a passion for their own learning, and they look for opportunities to challenge themselves as well as their students. (p. 242)

This list emphasized the importance of leaders who are also lifelong learners. True learners and leaders can appreciate the advice and knowledge they gain from others in their professions.

In her article, “Helping Teachers Become Leaders,” Phelps (2008) described the three roles a teacher-leader may fulfill. First is the role of *advocate*, or someone who is willing to speak up for whatever is best for student learning. These teacher-leaders have the ability to “frame and reframe issues so that students and learning remain the central focus” (Phelps, 2008, p. 120). These teacher-leaders talk to small groups, comprised of peer teachers and administrators within their schools, as well as large groups, which may be comprised of an entire school system, when advocating for their students. Second, is the role of the *innovator*. These bold teaching professionals have creative voices that take action; they are unafraid to try new things and, “act as change agents within their schools” (Phelps, 2008, p. 121). Third, there are those teachers who speak on behalf of the teaching profession itself known as the *stewards*. Unlike innovators and advocates whose efforts are often more readily linked directly to student achievement or school improvement, stewards nevertheless will “tirelessly work to improve the status of teaching” (Phelps, 2008, p. 122). By accepting the responsibility of any one or more of

these three roles, a teacher is on the way to becoming a teacher-leader. It was interesting to find out which roles the teacher-leaders I interviewed described as their own and how they described themselves in one, two, or even all three of the roles identified in Phelps's study.

Research indicates that teacher-leaders have influence in the various educational settings in which they work. Hatch, Eiler White, and Faigenbaum (2005) studied four teachers from different school settings and the impact these teacher-leaders had on a variety of educational contexts, both locally and nationally. For instance, one teacher in the study, identified as Wolk, worked as a resource teacher in a large urban school. Wolk found that, "beyond her influence on classroom practice, [her] work helps to provide her colleagues with inspiration and support in other aspects of their lives" (Hatch, et al., 2005, p. 1008). After Wolk earned her National Board for Professional Teaching Standards certification, for example, 13 other teachers in her school undertook this impressive enterprise.

Another teacher in Hatch, et al.'s (2005) study, who was identified as Boerst, started a "teacher reflection group," primarily as a way,

...of continuing conversations with colleagues that began when he was going through certification for the National Board of Professional Teaching Standards.... However, as the group has evolved into a regular source of professional development for a number of teachers in the district, the district has steadily increased its support for the group, and some district decisions and policies have begun to reflect the influence of the group's work and approach. (p. 1009)

Boerst's work provided an excellent example of how teachers can develop their leadership skills to influence policy creating district-wide changes that improve their school system's culture.

Cone, another teacher in Hatch, et al.'s (2005) study used her teacher-leadership status to influence her school's district policies on tracking students. Her work on tracking, based on her own classroom experiences, has been published in *Newsday*, *Harvard Educational Review*, the *College Board Review*, *Phi Delta Kappan*, and the *Harvard Education Letter*. Cone shared:

Teachers can be passionate and committed intellectuals with ideas and points of view that are worth paying attention to. In her view, more teachers should be out in public acting as “bridges” between research and practice and more venues are needed in which teachers can have a real voice, not just a pat on the back. (Hatch, et al., 2005, p. 1011)

With her writings and leadership efforts, Cone's impressive influence touches a wide range of educational settings far beyond her own school.

The fourth teacher studied by Hatch, et al. (2005) was identified as Moore. She, like Cone, reached a wide range of policymakers in places other than her home school in Shelby, Mississippi. Moore based her work in the study, on her own experiences in the high school classroom as an English and journalism teacher. Best of all, she used her so-called “fame” to make sure not only her voice but also her colleague's voices were heard. As she stated,

“There's this pattern, and I've seen it in a lot of places. You like to pat teachers on the back and say, ‘Oh isn't this wonderful. You do a good job. Here is your apple.’ But you don't want to talk to me about the things that really matter as if I have no professional opinion that's worth hearing when it comes to policy.” (Hatch, et al., 2005, p. 1012)

All four of these courageous teachers provided evidence of how teacher-leaders can positively affect policy, student achievement, and school cultures on site-based, district-wide, and national fronts. Many teachers may begin efforts to be heard for personal reasons connected directly to

their own classrooms and students, but an idea that is presented well and executed successfully may take on a life of its own, ultimately affecting schools far beyond that of the initial teacher-leader.

One of the most influential people to affect teacher-leaders' development is the principal of their schools. Other than the individual teacher, perhaps no other person can wield as much power over this process. Barth (2001) addressed both the positive and negative effects a principal can have on the development of teacher-leaders. First, he acknowledged that there are some justifiable reasons why principals guard their authority protectively. For one, "They have worked long and hard to get where they are. Now that they have secured their positions as leaders of schools, they protect those positions tenaciously" (Barth, 2001, p. 447). Next, Barth (2001) pointed out that when principals share leadership with their teachers, they risk having to take the blame for failed policies if they empower a teacher who is not truly prepared to work hard and lead well.

Barth (2001) also provided examples of the ways that principals who are secure about their abilities to lead can facilitate the development of teacher-leaders. They do this by supporting teachers in the following ways:

- By relinquishing control and allowing creativity and group problem-solving;
- By trusting teachers enough to allow them chances at leadership tasks;
- By empowering teacher-leaders to share their voices in a welcoming format;
- By including teacher-leaders in resolution of school issues;
- By protecting teacher-leaders from "naysayers" within their teaching community;
- By recognizing publicly the efforts of teachers who take the risk of sharing their teacher's voice;

- By sharing responsibility for failures, and promoting ideas of working together to fix mistakes; and,
- By giving abundant praise for successes (Barth, 2001, p. 448)

With these actions exercised by the principal, teacher-leaders have a safe and encouraging environment in which to develop their leadership skills. This promotes a sense of shared responsibility for the success of the school and its culture.

Jorge de Lima (2008) outlined two positive results administrators could experience when they create opportunities for teachers to lead. First, when administrators encourage teacher-leaders, teachers take ownership because of their involvement in developing professional learning communities and professional development within their schools. Secondly, when there are several teachers in the school who feel confident about undertaking leadership roles and responsibilities, there exist plenty of stakeholders to share in the work. This helps everyone avoid burnout.

According to Zepeda, et al. (2003), school systems create opportunities for teachers to become leaders when they encourage administrators to “empower teachers actively, consistently, and authentically” to lead (p. 122). Some of the ways school systems can encourage teacher leadership include,

- Creating opportunities for more teachers to share their expertise.
- Develop an ethos of support and care to nurture teacher leadership through mentoring teachers through the process of evolving as leaders.
- Embed leadership as learning opportunities in the day-to-day work of teachers.

(Zepeda, et al., 2003, p. 122 – 123)

Additionally, Zepeda, et al. recommended that school systems provide professional development and mentoring for teacher leaders.

Supports and Barriers for Teacher-leaders

Supports

To create opportunities for teachers to lead, school administrators must first expand their concept of what leadership means. In a study published in 2003, Bennett, Wise, Woods, and Harvey found the following tenets necessary for creating opportunities for teachers to lead within schools:

- School leaders must focus on seeing leadership as an outcome of the dynamics of interpersonal relationships as opposed to individual actions.
- School leaders must foster a climate of trust and openness as a basis of interpersonal relationships among leadership teams.
- School leaders must “let go” rather than simply delegate tasks.
- School leaders must recognize expertise rather than formal positions as the basis of leadership roles within their schools’ groups. (p. 6)

By following these principles, administrators create genuine opportunities for teacher-leaders to emerge within their schools and share their vast storehouses of knowledge.

Carr (1997) discussed the role of principals in the advancement of teacher-leaders. She wrote, “Administrators... have great influence over the climate and culture of a school.

Traditionally, they’ve functioned as the gatekeepers who decide who may, or will, go where and when” (p. 243). Additionally, when administrators model transformative leadership, teachers feel supported in their attempts to enact their leadership roles. Carr described a relationship that benefits the entire school’s body by stating what happens when all the stakeholders, including

the administrators, parents, students, and teachers are working toward common goals for their schools. Summarily, Carr (1997) described what administrators could do to nurture and support teacher-leaders:

Given the influence they do wield over school climate, administrators can consciously and energetically set about building a climate where instructional risk taking is encouraged and valued, where communication between and among various constituencies in the school is encouraged and enabled, and where initiatives are welcomed by the question “How can I help?” rather than “Do you know what that would take?!” (p. 243)

The importance of the administrator’s influence is a key topic researched in this study. In the middle level setting, an administrator’s support can be invaluable to middle level teacher-leaders.

Steel and Craig (2006) promoted many of the same ideas by describing ways administrators can support and foster teacher-leadership within their schools. When principals show “confidence in teachers’ professional judgment,” they are encouraging teacher-leadership (Steel & Craig, 2006, p. 677). Principals who engage in meaningful, two-way professional conversations with their teachers, listening to and acknowledging teachers’ expertise, aid in the creation of teacher-leaders. In addition, when principals recognize teachers’ contributions, give constructive feedback, support teachers as learners, and create opportunities for teachers to collaborate, they extinguish teacher’s feelings of isolation and give rise to teacher leadership (Steel & Craig, 2006).

In her article, “Leadership Redefined: An Evocative Context for Teacher-leadership” Linda Lambert (2003) described characteristics principals should identify in teachers whom they are considering for leadership opportunities. She stated that teachers who would make good leaders include, “those who have managed to keep their sense of purpose alive and well, and are

reflective, inquisitive, focused on improving their craft, action oriented; they accept responsibility for student learning and have a strong sense of self” (Lambert, 2003, p. 422).

However, she cautioned school leaders to realize that all teachers have the potential to lead if given the opportunity. Specifically, when teachers see leadership opportunities presented not as a person in a “specific role,” but rather as “a broadly inclusive culture concept” they believe they can participate because the school is a community of connected learners (Lambert, 2003, p. 424).

Lambert also offered practical suggestions for creating those learning communities, such as describing different types of conversations that should take place. For example, conversations could be presented as “coaching questions asked or ideas shared in one-on-one conversations, data dialogues in inquiring conversations, action research projects, or long-range planning involving parents and the community” (Lambert, 2003, p. 426). Lambert also proposed that principals foster opportunities for teacher-leaders to emerge when they publicly recognize teachers as experts and valued contributors to school-wide decision-making.

In 2005, Halverson noted that principals create opportunities for teachers to emerge as leaders whenever they encourage professional learning communities. According to Halverson (2005), administrators foster professional learning communities by using, “well-designed artifacts such as discussion groups, collaborative curriculum design efforts, and formative assessment policies” as tools for building team-oriented school communities (p. 4). Additionally, Halverson (2005) stated that “the role of school leaders in building professional community is to create structures that build and sustain relational trust around issues vital to instructional improvement” (p. 6). In other words, Halverson (2005) made the argument that school leaders should build opportunities for teachers to interact with common goals that benefit the learning community of their schools, as well as furthering their own professional growth. Then, if school

administrators give teachers both the resources and support needed to act upon the conclusions or goals reached within their professional learning communities, the ultimate results are successful, improved schools (Halverson, 2005).

As a concrete example of what fostering professional community looks like, Halverson (2005) offered a study he conducted at a Chicago elementary school. The elementary school's principal initialized a program to improve student achievement and teacher sharing of instructional activities called "The Breakfast Club." She bought her teachers breakfast once a month and asked them to discuss the most recent research available for improving early childhood literacy. At first, because participation was voluntary, the meetings were small, sometimes with only five teachers in attendance. However, once word got out that the principal merely sat in the background listening, thus allowing her teachers to lead the meetings, attendance became almost 100% at each meeting. One teacher was quoted as saying:

We found out that we enjoyed talking with one another, that it was a benefit. Because we don't have a chance to talk with one another—if you leave your class and start talking to one another, teachers don't have that luxury. So this gave them a chance to talk with one another. (Halverson, 2005, p. 10)

Within three years of initiating the program, the principal had teachers on staff who had already tried several of the techniques and strategies shared in the Breakfast Club meetings. Best of all, these pioneering teachers reported back to their colleagues, sharing which strategies had improved their students' achievement and which ones had not (Halverson, 2005). The principal at this elementary school provided her teachers with opportunities to lead and learn from one another's professional growth.

In his 2008 article, Frost examined research that emphasizes opportunities created for teachers to develop leadership skills. One of the teachers highlighted in Frost's research, Anne (pseudonym), described her excitement and amazement at unlocking her leadership skills while being supported in her leadership development by a fellow teacher. Frost (2008) related that:

Firstly, Anne's development as a leader was supported by Maria (pseudonym), a co-leader of the Teacher Led Development Work group. Maria's support and mentoring underpinned Anne's confidence to influence beyond her faculty.... Secondly, the collaborative and collegiate culture at the school enabled Anne to widen her conception of leadership. She talked about the prevailing culture of trust and respect where risk taking was encouraged but no blame attached if things did not go well, "chatting about teaching and learning, it is nothing official it is just part of the conversation at school." (p. 343)

Another teacher in Frost's (2008) study led a project that drew her entire school, both colleagues and students, into a deep discussion about the pedagogy of learning preference profiles. This same teacher praised the principal for letting her lead a team of senior faculty members, who in turn mentored newer faculty members, so that they could lead initiatives in the upcoming school year. In the end, this collegial environment allowed veteran educators and novices to learn equally from one another, to the benefit of the students and the entire school's improvement.

Schools with strong, vibrant teacher-leaders who use their leadership to improve the learning environment promoting collegiality among their staffs traditionally have less staff turnover and higher student achievement records than schools with top-down leadership formats. Teachers and administrators need to appreciate the roles they play in creating these safe and

encouraging environments that allow teachers to develop their professional voices and leadership skills. In my study, the participants recognized and praised some of these same types of support systems.

Barriers

Phelps (2008) discussed the teacher leadership phenomenon she called “Jack and Jill” (p. 122). In this scenario, Jill is the “super hub,” or go-to person, who as a teacher-leader, voices ideas about improving and changing school culture. Jack, on the other hand, is a “negative, toxic hub” who never wants to change, to grow, or to learn and dissuades others from trying (Phelps, 2008, p. 122). Phelps (2008) proposed that the way to turn a Jack into a Jill is for the teacher-leaders of the school to use their voices to enlist and engage Jack’s support in small increments at first. Then, as the Jacks of the school grow more confident and comfortable with the changes taking place, and as they experience success within their own classrooms based on new strategies and policies introduced by Jills, they, too, may feel empowered enough to give voice to ideas (Phelps, 2008). Assuming teacher-leaders can get past these Jacks, Phelps also described too little time, too much paperwork, and too many non-teaching duties as barriers to teachers taking leadership roles in their schools.

Ironically, besides site administrators, the other people most likely to help or hinder teachers from becoming leaders are other teachers. In his study, Barth (2001) stated:

Many teachers report that the greatest obstacle to their leadership comes from colleagues. If they can get by the issues of time, tests, and tight budgets, their reward is the disapprobation of fellow teachers and administrators, who wield an immense power to extinguish a teacher’s involvement in school leadership. (p. 446)

Barth (2001) elaborated on the ways that colleagues sabotage one another's efforts to give voice to teacher-leadership initiatives. These include what he deems "inertia" which is defined by Barth as some teachers' resistance to change (p. 446).

Another impediment is teachers being overly cautious about standing behind a fellow teacher who is acting without an authorized position of leadership. This idea is also discussed by Zepeda, et al. (2003) when they described informal teacher leaders and issues of "power" that exist whether a teacher is in an official leadership position or not. When a teacher-leader is unclear about his/her power level in the school, having no support from fellow teachers may further discourage and undermine attempts to exact change. Another way these same fearful, negative teachers hurt teacher-leaders' efforts at their school is by conveying feelings of being threatened by their peer's passion for new ideas, a passion they may not share. Finally, Barth (2001) described a lack of collegiality—"talking about practice, sharing craft knowledge, rooting for the success of others, [and] observing one another engaged in practice"—as a form of passive-aggressive resistance teachers can use to obstruct leadership growth in their fellow teachers (p. 446). However, he acknowledged that teachers, "hold the power to unlock one another's leadership potential" and promote the development of their peers' voices (p. 447). Barth (2001) also cited standardized tests as having a, "chilling effect on the teaching profession and on the inclination and ability of teachers to assume broad leadership within their schools" (p. 446).

The sections on "Supports" and "Barriers" provide a frame of reference for the teacher-leaders in this study to share their experiences of either receiving support or overcoming barriers to be leaders in their schools. While the participants in this study have encountered some of the same supports and barriers as described in the studies that were reviewed in this section, these

studies do not deal exclusively or primarily with middle level educators. Once again, this leaves a gap in the literature about teacher-leaders and their experiences negotiating leadership roles in middle level schools.

Section Summary

In this section of the literature review, the studies presented provide background and justifications for the need of teacher-leaders, as well as studies describing how teachers become leaders. However, a gap exists in the literature. I found no studies that focus on the experiences of middle level teacher-leaders acting in a variety of formal and informal leadership roles that were guided by their desire to be advocates, innovators, and/or stewards, and were developed based on the perspectives of the teachers. In 1995, Whitaker wrote:

Although the role of principals as instructional leaders is unquestioned, they cannot cause lasting school-wide change by themselves. Recognizing and using the informal leadership of the most widely thought of teachers and putting them in a position to be the flag carriers is the best way to implement new programs, curriculum, or beliefs. (p. 356)

Although a large body of research discusses the importance of building site-based management to create change in schools, “There is not, however, a clearly developed focus as to how to use site-based management or collaborative techniques” to best create opportunities for teacher-leaders to develop as both informal and formal school leaders (Whitaker, 1995, p. 357). This is a gap in the literature my study helps to fill.

Additionally, this section provided examples of teacher-leader programs and reasons teacher-leaders are important in schools, but a gap exists in the literature because I found no studies that share perspectives written from the point of view of middle level teacher-leaders. My

study does provide middle level teacher-leaders' perspectives of what supports and barriers they face and, therefore, gives suggestions as to how school systems can create opportunities for teachers to lead in middle level settings.

To summarize, the information shared in this section provides a framework for how a teacher may become a leader. The participants in this study shared their stories of how they each became a middle level teacher-leader, filling a gap in the literature that existed before my participants shared their perspectives on the supports and barriers they encountered on their journeys to becoming teacher-leaders.

There exists a great deal of literature supporting the idea that teacher-leaders positively influence all aspects of a program, including staff development, peer mentoring, and student achievement. The literature that describes the perspectives of middle level teachers in particular and their descriptions of the supports and barriers that encourage and/or challenge their efforts to lead in several roles enacted as advocates, innovators, and stewards of middle level teacher-leadership is missing. By addressing this gap, my study provides insights and suggestions for creating middle level teacher-leadership opportunities.

CHAPTER 3

METHODOLOGY

Introduction

The purpose of this study was to examine middle level teachers' perspectives about the supports of and barriers to their efforts to be teacher-leaders. The guiding research questions were

1. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?
2. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?

A thorough search of the literature did not produce one study that focused on supports of and barriers to leadership from the perspectives of middle level teacher-leaders. The literature reviewed did reveal that young adolescents and their schools benefit from the contributions of successful teacher-leaders. Consequently, the findings of this study, which investigate the perspectives of teacher-leaders about their experiences with supports and barriers to their leadership efforts, may be significant to school systems as they try to support the development of middle level teacher-leaders and could contribute to the improvement of middle level education as a whole.

Two open-ended, taped interviews were conducted with five (N=5) middle level teacher-leaders. Additionally as the researcher, I kept a field journal and recorded observations I made during the interviews that included thoughts about the participants' body language, facial

expressions, and levels of comfort as each question was asked. In the field journal, I also noted questions for further clarification, so as not to interrupt the participant's flow during each interview. This chapter includes descriptions of the research design, data collection methods, data analysis methods, validity, and the limitations of the study.

Research Design

This study examined how each of the participants constructed meanings of their roles as middle level teacher-leaders and what they identified as supports of and the barriers to enacting these roles. Peter Berger and Thomas Luckmann first coined the term *social constructionism* in their 1966 book, *The Social Construction of Reality: A Treatise on the Sociology of Knowledge*. Berger and Luckmann (1966) believed that socially constructed knowledge is based upon people's interactions within their societies and cultures. Today, social researchers recognize social constructionism, or constructionism, as an epistemology that explains how "we know what we know" and has informed the theoretical perspectives of symbolic interactionism, phenomenology, and hermeneutics, to name a few (Crotty, 2006, p. 3). During the interviews in this study, when the participants identified the supports and barriers they had encountered while acting as teacher-leaders, they exemplified Crotty's (2006) description of the epistemology of social constructionism when he wrote, "Truth, or meaning, comes into existence in and out of our engagement with the realities in our world" (p. 9). The teacher-leaders' worlds consisted of their middle school and its culture. The society of their school affected the participants' perceptions of the supports of and barriers to their middle level teacher-leadership roles.

Why a Qualitative Approach?

This study's purpose was to examine the perspectives of middle level teacher-leaders, specifically the supports of and the barriers to their roles as leaders. Perspective studies require interactions between the researcher and the participants that cannot be quantified yet still capture the individualized nuances and richness of description for each participant's meaning-making (Crotty, 2006). Since this qualitative study examined the meanings the participants made from their interactions with people and policies that make up their "world" of a middle school, constructionism was a natural fit for the epistemology that guides this study.

Crotty (2006) asked:

What, then, is constructionism? It is the view that all knowledge, and therefore all meaningful reality as such, is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context. (p. 42, emphasis in the original)

Furthermore, unlike studies which are based primarily upon objective, measurable indicators that can be specifically quantified, the descriptions shared by each of the participants in this study exhibit each person's unique interpretation of the events as they experienced them. As Crotty (2006) stated, "... meaning (or truth) cannot be described simply as 'objective'" (p. 43). To state it another way, qualitative data cannot be assigned numerical values (Yin, 1993). The purpose of this study was to understand the perspectives of the participants, not merely to quantify the responses they gave during the interviews. Crotty (2006) emphasized that "the researcher strives to see things from the perspective of the participants" (p. 7). The participants' stories were the data and allowing them to explain their perspectives drove the analysis of these data as well.

Narrative Inquiry

The methodology for this study was narrative inquiry. According to Clandinin and Connelly (2000), "...narrative inquiry is a way of understanding experience" and "is stories lived and told" (p. 20). Additionally, narrative inquiry is not an "objective reconstruction of life" but "a rendition of how life is perceived" (Webster & Mertova, 2007, p. 3). It is a suitable methodology to use when studying the social constructions of individuals' identities while using a theoretical framework that describes how individuals negotiate their roles in societal groups (Clandinin & Connelly, 2000; Thompson, 1999; Webster & Mertova, 2007).

Additionally, the participants were relaxed and comfortable sharing "stories" about their leadership experiences just as Jonassen (1997) described when he said:

The concept of narrative can be refined into a view that research is the construction and reconstruction of personal and social stories. Moreover, the narrative can tap the social context or culture in which this construction takes place. Just as a story unfolds the complexities of characters, relationships, and settings, so too can complex problems be explored in this way. (p. 72)

The participants in this study shared stories about their experiences as teacher-leaders, focusing on and providing insights into the supports of and barriers to middle level teacher-leadership as well as occasionally working out a problem in the telling and re-living of an experience.

Narrative inquiry is well suited to research on teaching and teacher education, according to Carter (1993): "The special attractiveness of story in contemporary research on teaching and teacher education is grounded in the notion that that story represents a way of knowing and thinking that is particularly suited to explicating the issues with which we [teachers] deal" (p. 6). In a study of the conditions that facilitate or hinder teacher's perceptions of empowerment,

Thompson (1999) commented, “Listening to their stories may be informative for understanding the conditions under which teachers work” (p. 48). In the same way that the participants in Thompson’s (1999) study were examined using narrative inquiry methods because of the understanding their stories could bring to issues of empowerment, middle level teacher-leaders in this study told stories about the supports and barriers to their leadership. The perspectives these participants shared could aid administrators and district personnel in creating amenable climates that will foster the creation of middle level teacher-leaders.

Finally, life as a teacher can present itself narratively because teachers often find themselves relating knowledge to their students, peers, administrator, parents, and communities in the form of stories. Many teachers make sense of their teaching worlds through stories including, for example, stories that teach about the world, stories providing examples of desired behaviors shared with students, stories re-telling students’ behaviors shared with parents, and stories sharing classroom experiences with other teachers. Clandinin and Connelly (2000) said it well: “For us, life—as we come to it and as it comes to others—is filled with narrative fragments, enacted in storied moments of time and space, and reflected upon and understood in terms of narrative unities and discontinuities” (p. 17).

Data Collection

Instrument Creation

The focus of the study was to explore middle level teacher-leaders’ perspectives on the support for and barriers to their leadership. Participants were given the opportunity to take part in two interviews—an initial interview and then a targeted follow-up interview. I kept a researcher journal throughout the study and used my journal and field notes to guide both the interviews and data analysis.

To elicit my participants' perspectives of the supports of and barriers to their efforts to act as middle level teacher-leaders, I chose open-ended interview questions asking the participants to share narratives about both positive and negative leadership experiences. Once I asked a question, the participants spoke as long as their narratives dictated while I tape-recorded the interviews. I prompted them to ask any questions they had if they needed me to clarify an interview question and in turn I asked them for more detail if I was unclear about any part of the narratives they shared.

I asked my participants to share narratives that described their middle level teaching philosophies and I let them share any details that they deemed necessary to answering the question, "Describe your middle level teaching philosophy." (see Appendix B, question 1) This allowed me as the researcher to see what the participants considered their roles as middle level educators should be in their own words. This was important to the context of my study, which sought to reveal these participants' perspectives of their roles as teacher-leaders at the middle level.

Additionally, I asked questions that encouraged my participants to identify supports of teacher-leadership, such as "In your efforts to be a teacher-leader, how are you supported? Discuss who and/or what provides support to you as a teacher-leader." (see Appendix A, question 7) I also asked participants to identify barriers to their efforts to act as teacher-leaders, such as "What are the barriers to your efforts to be a teacher-leader? Discuss who and/or what provides barriers to you as a teacher-leader." (see Appendix A, question 8) Participants answered the questions in narratives, with little or no further prompting on my part. In fact, the participants

shared rich, detailed stories about their teacher-leadership experiences that gave ample data that directly addressed my research questions about the supports of and barriers to their efforts to act as middle level teacher-leaders.

Participant Selection

The school site from which participants for this study were selected is located in a semi-rural area that is part of a large metropolitan county's school system (Winston County Schools). Collins Middle School (CMS) (pseudonym) in 2011 had approximately 936 students in grades 6–8. The student population of Winston County Schools (pseudonym) was 53 % White, 37% Black, 5% Hispanic, 2% Asian, and 3% Multiracial, according to data reported by the state's Department of Education's demographic information for 2011. Free and/or reduced price lunch services were received by 65.4% of the students. Despite a student population that faced great challenges to their educational success based primarily on their socio-economic environs, CMS had earned Adequate Yearly Progress for the past three years prior to 2011.

I used reputational sampling, a type of purposeful sampling, as a means for generating a pool of participants (deMarrais & Lapan, 2004). Because I supervised student teaching interns at CMS in the 2009–2010 school year in my role as a graduate student at a nearby university, I was familiar with the school's administrators, faculty, and staff. The principal at CMS, Dr. June (pseudonym), first recommended possible participants for this study. I asked that she base her recommendations for a pool of potential teacher-leaders on their being recognized as teacher-leaders by other teachers, her, and other administrators in the school. I also asked her to consider the following quote and to suggest any of her school's faculty who came to mind after reading it:

Teachers who become leaders experience personal and professional satisfaction, a reduction in isolation, a sense of instrumentality, and new learnings—all of which spill

over into their teaching. As school-based reformers, these teachers become owners and investors in the school, rather than tenants. They become professionals. (Barth, 2001, p. 443)

Dr. June generated a list of eight teacher-leaders as potential participants in the study. Next, I contacted all eight proposed participants by email (see Appendix C). I asked if they would meet with me to discuss their possible participation in my dissertation study. Seven of the potential participants agreed to meet, and one of them offered her home as the location for the initial meeting. I explained the purpose of the study and the research questions. I then provided a copy of the Participant Consent Form to each person (see Appendix D), which explained my procedures for keeping their identities confidential if they agreed to participate. Their responsibilities included being available for two face-to-face, tape-recorded interviews, lasting a minimum of one hour each. Additionally, they were asked if they would agree to answer any follow-up questions by email or phone. Five of the teachers agreed to participate, and three declined citing too many previous commitments.

The participants in this study included one white male, one black male, and three white females and had years of teaching experience ranging from 8 to 19 years. Their ages were between 28 and 54. All five of the participants had earned their masters degrees, taught in a middle school for at least eight years, and one of the participants had international teaching experience because he was originally licensed to teach in his native country, South Africa. None of the participants had obtained his or her higher education in the subject of teaching middle level students, and they represented diverse educational backgrounds. The following individual profiles provide background on each participant.

Mrs. Clayton.

Mrs. Clayton (pseudonym) has taught eighth grade English language arts (ELA) for eight years at Collins Middle School (CMS). She earned a dual Bachelors of Arts in English Literature and Writing and a minor in Spanish Literature. She then earned a Master's Degree in Secondary Education with the intent of teaching high school literature courses. However, just before her graduation, a family friend and a former principal of CMS, who had aggressively sought her for a position as an eighth grade ELA teacher, approached her about a job. Mrs. Clayton has taught at CMS ever since.

Mr. Milo.

Mr. Milo (pseudonym) also has an interesting background. He actually graduated from Georgia Institute of Technology in the 1960s with a Bachelors of Science degree in Building Construction Management, and a minor in mechanical engineering and energy studies. He worked as vice president of a large worker's compensation insurance carrier until the company was bought out and he was given mandatory retirement. With his unexpected opportunity to explore a different career path his wife suggested he try teaching. Since he had such a strong background in math and science, he entered the Teacher Alternative Preparation Program(TAPP) and earned his master's degree in Education. Then, upon passing the Georgia Assessments for the Certification of Educators (GACE) in middle grades science, he started teaching sixth grade science at Collins Middle School, where he has remained for eight years.

Mrs. Blush.

Mrs. Blush (pseudonym) earned a Master's Degree in Agriculture Education and took the certification tests (at that time the Praxis) for middle school science and art and passed. She taught agriculture in a rural middle school, and then upon getting married, moving, and having a

baby, she switched to teaching middle school art. Finally, in her twelfth year, she took a position at Collins Middle School. At the time of this study, Mrs. Blush had been an eighth grade science teacher at CMS for seven years.

Mrs. Coco.

Mrs. Coco (pseudonym) began her education by earning a Bachelor's of Science in Psychology. She then decided that she was more interested in classroom education and earned her certification and a Master's Degree in Special Education. She began her career at Collins Middle School teaching Exceptional Student Education collaborative classes, but found she enjoyed the general education students and content, too. Therefore, she took the GACE in middle level science and math and for the last eight of her ten total years at CMS, she has taught eighth grade math and science general education courses.

Mr. Douglas.

Mr. Douglas (pseudonym) was born, educated, and certified to teach in South Africa. For the first two years of his career, he taught World History in a South African high school, then starting in his third year, he taught high school history courses in England. Mr. Douglas holds a Master's Degree in Education, but for the past eight years, he has taught eighth grade American History at Collins Middle School.

Summation of participant profiles.

All of the participants in this study have held formal teacher-leadership positions at a middle level school during their careers, with four of the participants in formal teacher-leadership positions at the time of this study. Table 3.1 provides an overview of the participants' educational backgrounds, subjects and grade levels taught, and teacher-leadership experiences.

Interview and Data Protection Procedures

After obtaining approval from the Institutional Review Board (IRB), receiving permission from the school system, the school's principal, and a signed consent from each participant, I conducted face-to-face tape recorded interviews for each of my participants, took field notes in a journal during the interviews, and then transcribed the interviews. The initial interviews with each participant lasted between 52 and 64 minutes. Appendix A is the initial list of open-ended interview questions.

Table 3.1
Participant Characteristics

Participant	Degrees Held	Subject/ Grade Level	Years of Experience	Current Formal Leadership Positions	Former Formal Leadership Positions
Mrs. Clayton	B.A. in English Literature and Writing; Masters in Secondary Education	8 th grade English Language Arts (ELA)	8	None	ELA Department Chair (6 years); Builder's Club Sponsor; ELA Mentor Teacher;
Mr. Milo	B.S. in Building Construction Management; Master's in Education	6 th grade Science	8	POD (Team) Leader; Science Department Chairperson; School Leadership Team	Principal's Advisory Committee
Mrs. Blush	Masters in Agricultural Education;	8 th grade Science	19	8 th Grade Level Chairperson; POD (Team) Leader; School Leadership Team	Future Farmers of America Club Sponsor
Mrs. Coco	B.S. in Psychology; Masters in Special Education;	8 th grade Math	10	Beta Club Sponsor	Exceptional Student Educator (ESE) Mentor Teacher; Principal's Advisory Board; POD (Team) Leader
Mr. Douglas	Master's in Education	8 th grade Social Studies	8 (middle level) 13 (total)	Social Studies Chairperson; School Leadership Team	8 th Grade Chairperson; Harvard Leadership Conference State Rep.

The instrument used to interview the participants is a list of open-ended questions adapted from the narrative questioning techniques suggested by Webster and Mertova (2007): “In a narrative inquiry, questions should be structured in such a way that they encourage reflection and recall of the critical event” (p. 86). Also considered were the suggestions of Connelly and Clandinin (1995) who argued that the quality of narrative information is, “influenced by two criteria, ‘broadening’ and ‘burrowing’” (p. 11). “Broadening” is generalized information and not as valuable to the researcher; “burrowing” occurs when the participant focuses on an event being described and reflects on past, present, and future considerations that may result in his or her life as a result of experiencing the event. Attempts to draw “burrowed” responses from the participants required me to be a careful listener and to take copious notes in my field journal. By doing so, I was able to ask my participants to delve into particular subtopics unique to their individual experiences with supports of and barriers to their negotiations of their roles as teacher-leaders.

Each participant’s initial interview stories varied according to his or her perspective. For example, in Mr. Milo’s initial interview, he shared stories about his experiences in a business environment where he practiced management techniques that would later help him develop leadership qualities sought by his school’s administrators and his peer teachers. None of the other participants had a background in business and/or management, so their interviews did not discuss their teacher-leadership experiences from quite the same perspective. This created exactly what I had hoped: different middle level educators discussing the supports of and barriers to their leadership efforts. The follow-up interviews lasted between 45 and 60 minutes (see Appendix B for the guiding questions), and were grounded in and individually customized by what I learned in the initial interviews. For example, Mr. Milo spoke passionately about his lack

of middle level education pedagogy, but I disagreed with his estimation of his knowledge. Consequently, I made notes throughout his first interview whenever I heard an example of his pedagogical knowledge and shared those points with him at the beginning of his second interview. The same careful procedures of data protection were employed throughout the duration of the study. Those included keeping the digital recorder, my field notes journal, and the interview transcripts under lock and key when I was not using them for data analysis.

Data Analysis

The goal of this study's research was not to reach a conclusion about a hypothesis. According to Savin-Baden (2004), there are several factors that researchers must be aware of when conducting interview research:

We often assume that the people we interview and observe in the research process know and understand their lives and that in sharing their perspectives they 'know' what it is they are saying. Yet to assume that people know their lives in relation to the research topic is naïve; few of us really do know and understand our position on issues about which we may be being interviewed. In the process of discussing their perspectives our participants often experience a kind of "sense making" whilst they answer questions and share views. So often it is 'in arguing for themselves *to* themselves' as they construct interview data with us that they come to understand and realise their perspectives.

(pp. 370 - 371)

By allowing participants to review the transcripts from their first interviews, they had the opportunity to "make sense" of their perspectives. This process was repeated for the second interview as well and once each participant agreed with the accuracy of the transcriptions, I began to examine the data.

One step I took prior to interviewing the participants was to ask my sister (herself an educator) to interview *me* first using my interview protocols. This process is called a “bracketing interview” and it aids the researcher in being aware of the, “presuppositions you bring to your research and the perspectives your own experience provides” (Kramp, 2004, p. 115). Kramp (2004) explained that while bracketing makes you aware of biases you bring to your narrative inquiry work, you do not want to ignore your perspectives, as one of the most valuable elements to choosing narrative inquiry as a methodology is that the researcher is well versed in the society he or she is researching. I found the bracketing interviews to be extremely beneficial to my revision of my interview questions. For example, rather than asking my participants specific, leading questions, I gave them broader requests that allowed them to take the story they were sharing about their experience in the direction they wished it to go. An example would be Question #3 from my initial interview: “Tell me about a time that you felt like a leader in your school” (see Appendix A). In every instance, the participants being interviewed gave me rich, detailed accounts of memorable experiences—pleasant or unpleasant—in which they felt like leaders. The open-ended nature of the question and the fact that it was minimalistic as far as pushing for a specific direction for the participants’ shared narrative answers kept me from giving my perspective, while allowing me to get a deeper, even burrowing, view of theirs.

After I completed all of the participants’ first interviews, I read them through three times, and during the third review began coding themes that were emerging across participants’ narratives. In the reading and re-reading of the interview transcripts, the themes began to jump out at me. I began to narratively code my data, which Clandinin and Connelly (2000) describe as the process of taking field texts, which include texts from interviews and the researcher’s journal, and categorizing these texts by placing like pieces of text into specific categories or subjects. For

example, I found that some of the participants cited the provision of funds for professional development and classroom supplies a valuable support for their leadership roles. Ironically, a lack of funding for professional development and classroom supplies would also become the theme for one of the barriers to their efforts to enact their roles as teacher-leaders. By coding similar examples from each participant's transcripts, I was able to collapse the data into categories and/or themes.

When asking how each participant identified barriers to and supports of their attempts to act as middle level teacher-leaders, I used an "analysis of narrative" technique, which "involves identifying themes within each story and those common to all participants" (Polkinghorne, 1995, p. 16). I could then adhere to my theoretical framework of role theory. This type of analysis worked well for my study because my purpose was to understand the participants' perspectives of their experiences in negotiating supports and barriers to their roles as middle level teacher-leaders. Within their stories, I was able—through careful reading, re-reading, identifying of themes, and then extracting threads and examples from the stories they shared—to begin to make sense of their sense-making of the data (Kramp, 2004; Polkinghorne, 1995).

By examining the participants' stories, I found some common themes that emerged and aligned with one or the other of my research questions. Table 3.2 provides an overview of those emergent themes.

Validity

No matter how carefully I worded the questions, no matter how well I bridled my own perspectives, observations, and opinions about this study's topics, my research would not stand the test of validation if I did not return with my analysis for my participants to review. Asking

each of them to read over not only the transcript of their individual interviews but also my analysis of the themes and meanings I found in their narratives was crucial to the integrity of my study.

Table 3.2
Research Questions and Emerging Themes

Research Questions	Emerging Themes
1. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?	Budget constraints on supplies, professional development (travel and in-house), teacher compensation Class size Lack of trust from administrators and peers; fear of taking leadership stance Lack of respect for teacher-leaders' ideas/input; limits on freedom of choices Standardized testing and accountability for student performance indicators beyond teachers' control with related fears of job security and effects on teacher's salaries) Lack of time to do all that is required in a workday plus leadership duties Lack of common planning time with peers Excessive paperwork/bureaucracy Lack of support from central office Parents given too much control
2. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?	Peers who act as "cheerleaders" Administrators who give encouragement, financial support, trust, and actual "I have your back" support Appreciation from all stakeholders (tangible, e.g. "attaboys") Validation and inclusion of teachers in all aspects of decision-making

In fact, according to Kramp (2004),

...given the personal nature of the stories you analyze... you demonstrate respect and consideration for the participant, or narrator, when you ask each one to review the appropriate product of your research. In demonstrating such respect—returning to the storyteller—you affirm your findings. You begin and end with the storyteller. (p. 121)

I gave the participants their individual interview transcripts to read for accuracy. Then, I shared the themes that I identified as emerging by having compared all five participants' narratives to one another, and I shared these emerging themes with each participant verbally. Once the participants' agreed that the common themes I found represented what they identified as the emergent themes too, I was able to begin analyzing the data.

At the beginning of my study, I was worried about bringing my 20-plus years of teaching experience into the foreground of my research, thereby possibly tainting my results. Narrative inquiry proved my redemption, as instead, I found I was entranced by listening to my participants' stories. They were all so unique. While I could easily visualize the pictures their words painted of school classrooms, school faculties, school board offices and personnel, and school administrators, their recollections brooked no room for my interference. Instead, my being transparent at the onset and letting them all know my background seemed simply to relax them into speaking and storytelling freely, perhaps sensing an empathetic ear in mine.

Limitations

This study had limitations. The study was limited to the perspectives of five middle level teacher-leaders all teaching in the same middle school. I used reputational sampling to identify these five participants. Specifically, the administrator in their middle school identified these five participants as "teacher-leaders" according to the administrator's conception of what it means to be a teacher-leader. Perhaps these findings would have been different if I had drawn my participants from a different pool of teachers. In addition, rich and in-depth though the interviews were, the data were limited by the participants' willingness to be completely candid with me, the

researcher, particularly when discussing barriers to their leadership roles. If this study had spanned a longer time, the participants might have discussed barriers more comfortably, but that topic might always be difficult for some participants.

Summary

In this chapter, I presented descriptions of the research design, data collection methods, data analysis methods, validity, and the limitations of the study. I explained that the participants were selected through a means of reputational sampling as they worked at a middle school where I—through my interactions with the school administrators, faculty, and staff as a university supervisor—previously had established a reputation of trustworthiness and professional ethics. I discussed the links between the methods chosen for data collection, data analysis, and my theoretical framework. Additionally, I previewed the data’s alignment with my guiding research questions that address the supports of and barriers to middle level teacher-leadership. The next chapter will provide a detailed data analysis.

CHAPTER 4
ANALYZING THE DATA

Introduction

What are the supports of and barriers to middle level teachers enacting their roles as teacher-leaders? Perhaps a more appropriate question might read, “Why would any middle level teacher add work to his or her already over-filled schedule?” In 2003, Zepeda, Mayers, and Benson wrote:

Teacher leaders feel compelling reasons for responding to the call to leadership.

Although the “why” of teacher leaders provides pervasive reasons for teachers to respond to this call, equally pressing is the question, “Who will lead our schools if teachers do not respond to the call to leadership?” (p. 9)

Who will lead, indeed? In this chapter, five middle level teacher-leaders shared stories about their experiences leading at the middle level. With or without support, they felt compelled to serve the needs of their young adolescent students by participating in leadership activities.

The purpose of this study was to examine the perspectives of five middle level teacher-leaders and their answers to these guiding research questions:

1. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?
2. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?

Using a theoretical framework of role theory and a methodology of narrative inquiry, I examined and analyzed their stories. The participants shared their stories during taped, open-ended interviews.

The data are presented through narratives shared by the participants during two open-ended interviews. The first narrative describes each participant's middle level teaching philosophy. The subsequent narratives provide the participants' perspectives about the supports of and barriers to their efforts to act as teacher-leaders. The data analysis identifies and aligns the themes from the participants' narratives.

The Context of the Study

Collins Middle School

The middle school where all five participants were teaching at the time of this study was Collins Middle School (pseudonym) or CMS. The school is located in a semi-rural, semi-metropolitan area in Winston County (pseudonym). Winston County Schools are located in a southeastern state, and have nine elementary schools, three middle schools, and three high schools. At the time of this study, CMS served 936 students and had a population that consisted of 53% White, 37% Black, 5% Hispanic, 2% Asian, and 3% multiracial students. Free and/or reduced lunch services were received by 65.4% of the students. Until the 2010-2011 school year, CMS had met Adequate Yearly Progress (AYP) for three years in a row. However, the 2011 report indicated that within this Title 1 school, students in the following groups did not Meet or Exceed academic performance standards: Black students, Students with Disabilities, and Economically Disadvantaged students.

CMS is comprised of grades 6 – 8 with all core subjects (math, English Language Arts, science, and social studies) taught on teams. Each team had a team Leader who was designated

by the school's administrators, and from those team leaders a grade level chairperson was elected by the teachers. Additionally, at CMS each core subject had a Department Chairperson who was appointed by the administrators. Finally, the school's leadership team was comprised of the grade level chair people and the department chair people and met regularly with the school's three administrators (a principal and two assistant principals).

The Participants

I first solicited participants by asking the CMS principal to suggest teacher-leaders for my study and she provided eight names. Next, I sent those eight people emails (see Appendix C) asking them to attend a brief meeting that I used to explain what their participation in my study would entail. Out of the eight middle level teacher-leaders identified as potential participants for this study, five agreed to participate.

Chapter 3 includes a table that provides an overview of the participants' characteristics (see Table 3.1). Four of the five participants taught eighth grade core subjects one taught a sixth grade core subject at CMS during this study. The five participants consisted of three white women, one white man, and one black man. The participants' individual backgrounds will provide the context for their narratives. The section below provides an introduction to the five participants that better situates their perspectives, starting with general information about the participants and then sharing details about each participant's background as a middle level teacher-leader.

Mrs. Clayton's (pseudonym) background.

At the time of this study, Mrs. Clayton, a white, married female had been an eighth grade English Language Arts (ELA) teacher at CMS for eight years. She had a daughter who was not yet school age. In addition to her dual bachelor's degrees, she held a Master's Degree in

Secondary Education. While she enjoyed teaching middle school, she said she hoped to teach high school English someday and perhaps get into teacher education eventually. Among the formal teacher-leadership positions Mrs. Clayton held were ELA department chairperson and mentor teacher for new ELA teachers entering Winston County Schools.

Mr. Milo's (pseudonym) background.

Mr. Milo, a white, married male, was in his early sixties at the time of this study. By then he had taught sixth grade science at CMS for eight years. He and his wife (who was an elementary school teacher) had no children of their own, so he indicated he took great pleasure in contributing to the education of his young adolescent students. Mr. Milo's educational and professional background was different from the other four study participants' backgrounds. His original degree was in building construction management and he had worked most of his life in insurance companies as an executive. Among the formal teacher-leadership positions he held at CMS were that of science department chairperson and team leader.

Mrs. Blush's (pseudonym) background.

Mrs. Blush, a white female in her early forties, was married and had a son in high school at the time of this study. She began her career at CMS after transferring from a middle school located in a county outside of her son's school district. When he started school she moved job locations to have the same schedule as he did and she has been at CMS ever since. Mrs. Blush had 19 years of teaching experience, all in middle level settings, and at the time of the study, she was in her sixth year teaching eighth grade science at CMS. She has held various formal teacher-leadership positions over the span of her career and was the grade level chairperson at the time of this study and, therefore, on the school's leadership team.

Mrs. Coco's (pseudonym) background.

Mrs. Coco was a white, married female and a ten-year classroom veteran. Mrs. Coco who was in her early thirties had no children of her own. She began her career pursuing an interest in school counseling and psychology, but earned her Master's in Exceptional Student Education (ESE). She began teaching at CMS as an ESE collaborative classroom teacher but has taught eighth grade science and math for the past eight years in a general education setting. She has held formal teacher-leadership positions since her teaching career began that included being on the Principal's Advisory Board at another Winston County middle school and as a team leader at CMS.

Mr. Douglas's (pseudonym) background.

Mr. Douglas, a black male in his late thirties was married and had two school-aged children. He brought a culturally unique perspective to this study because he was born, educated, and initially certified to teach in South Africa. Additionally, Mr. Douglas had taught high school history courses in England. He had taught for a total of 13 years at the time of this study, the last 8 years as an eighth grade social studies teacher at CMS. Mr. Douglas had an avid interest in participating in this study because as he explained "developing teachers to their fullest leadership potential" was crucial to improving middle level education in Winston County. Among the formal teacher-leadership positions he has held were that of eighth grade chairperson and at the time of the study he was the social studies department chair and therefore on the school's leadership team.

Findings and Analysis

I conducted two interviews with each participant. The findings and analyses are divided into five sections, one for each participant. Each participant section has subsections of narratives

shared by the participants during the interviews. The first narrative is about the participants' middle level teaching philosophies and is followed by my summary of each of those narratives. Secondly, the participants shared perspectives identifying the supports of their efforts to be teacher-leaders, followed by my analysis of that narrative. In the third narratives shared, the participants identified barriers they perceive that hinder their efforts to act as middle level teacher-leaders and my analyses follow those narratives. The narratives are lengthy and there are three narratives for each participant. For that reason, the narratives are italicized to facilitate easier reading and they are labeled according to the subject of each narrative. Finally, at the end of each participant's section is a table to summarize the findings from the data analyses.

Mrs. Clayton's Teaching Philosophy

Mrs. Clayton tied her teaching philosophy to the way she led her life, constantly reaffirming that being a middle level teacher was ingrained into her identity as a *person* and the thought of separating the teacher from the woman was incomprehensible to her. When asked to share the story of her teaching philosophy, Mrs. Clayton had much to say.

The narrative.

Hmm. What is my personal teaching philosophy? Even though this is not something that I intended to do, I do enjoy teaching middle school, specifically eighth grade. I will be here as long as I see that I am doing good for my kids.

I always wanted to be a teacher but I honestly believe some people are born teachers and some people aren't. Just because you are really good at content doesn't mean that you will be a really good teacher.

Those things that make you a good leader in your classroom and let you have success with your kids, is a part of who you are as a person. The reason that I have a lot of success with my students is because of the things that are a part of who I am as a person and a part of who I let my kids see.

My kids need to know that I care about them and [that] I genuinely love them and I do. I genuinely care about my kids and they see me work hard and so when I ask them to work hard they are more willing because they know that I do what I ask of them. I had a girl today that her best friend died in a car wreck this summer. She's been having a really hard time with that. I chose a book for our class to read that actually deals with how to deal with grief and loss and she was real upset in class one day and she just wanted to talk to me about it and after our talk, I wrote her like a little "thinking of you" note for confiding in me and I slipped it on her desk and she came up later and told me how much that meant to her. I cannot teach without compassion for my students.

I am a leader for my kids. I'm a good moral and ethical example for my students; that makes them trust me. I'm the same person in the classroom that I am outside the classroom. There aren't two of me. I am the same person regardless of where you see me. At the beginning of the year, some kids let some profanity slip and the class was like "Ooooh..." I told them calmly, "I don't use profanity--very seldom if ever. It's because I have to have control of myself all the time," and I said "because if I cuss like a sailor in my personal life, if I'm not a good person in my personal life, then how good of a teacher can I be for you?" I want my kids to see me as a model of what it means to be a good, respectable human being, of what it means to be a good mother, whether they've got one or not. I think that who I am outside of school greatly

impacts who I am in my classroom. I'm a good member of my community, I'm active in my community so when I see my kids, you know outside of school, in Wal-Mart, they know I'm good.

Being a mother has greatly impacted me as a teacher because I see things in my classroom students and then I see things that I do with my daughter and I'm like, "Ohhhh, that kid didn't get what I'm giving my daughter." Nobody told her she was beautiful every day and that she was special and that nobody will ever love her the way her parents do and that's why she's the way that she is. I take a lot of my parenting into the classroom and tell my kids things like, "You don't need that. You are perfect just the way you are." Um, so I could not be the kind of person I was in the classroom if I wasn't the person I am in my personal life. I'm a real person and this is who I am. And I think my students appreciate that. (November 14, 2011)

Summary of Mrs. Clayton's teaching philosophy narrative.

Mrs. Clayton epitomized throughout her interview what Brown (2005) described as the reflective practitioner because she constantly made sense of who she was as a teacher by examining her own actions. Reflective practice is "the process of theorizing or making sense of experience to inform future action" (Brown, 2005, p. 5). She sees who she is as a person both inside and outside of school as an essential part of her identity as a middle school teacher: "...so I could not be the kind of person I was in the classroom if I wasn't the person I am in my personal life. I'm a real person and this is who I am" (November 14, 2011).

Several themes came out in her roles as advocate, innovator, and steward on behalf of her students and her school. For example, Mrs. Clayton demonstrated her role as advocate for her students when she stated, "I will be here as long as I see that I am doing good for my kids. ... My kids need to know that I care about them and [that] I genuinely love them and I do. ...and they see me work hard and so when I ask them to work hard they are more willing..." Another

example of Mrs. Clayton enacting her teacher-leadership role of advocate was when she said, "... I am a leader for my kids. I'm a good moral and ethical example for my students; that makes them trust me" (November 14, 2011). Mrs. Clayton advocated for her students through not only the way she taught but also the way she modeled hard work and ethical behavior.

Mrs. Clayton also expressed how she has acted as a classroom innovator in lessons for her students, including tailoring class assignments that meet the standards but also address some of her young adolescents' unique needs. She shared, "I had a girl today that her best friend died in a car wreck this summer. ... I chose a book for our class to read that actually deals with how to deal with grief and loss..." (November 14, 2011). Mrs. Clayton took the time to not only address the curriculum but also included choices of reading materials that helped her students broach subjects that touched students' lives outside of school, such as the death of a friend.

Finally, Mrs. Clayton was an active steward for the profession of teachers as a whole, and she demonstrated that stewardship in activities as simple as running errands. She stated, "I'm a good member of my community, I'm active in my community so when I see my kids, you know outside of school, in Wal-Mart, they know I'm good" (November 14, 2011). Mrs. Clayton epitomized the idea that the way a teacher leads her life outside of the classroom can have a profound impact on efforts to steward a positive image for teachers in general in the community.

Mrs. Clayton enacted her leadership role as an advocate for her students by demonstrating genuine care for each student and by modeling a life of ethical standards. She was an innovator in her classroom by searching for the best instructional strategies to engage her students in learning and growing into well-rounded people. Finally, she was a steward for the role of middle level teacher by playing an active role in the community where she lived and taught.

Mrs. Clayton's Identification of Supports of Middle Level Teacher-Leadership

The narrative.

This school where I'm currently teaching was undergoing a lot of... kind of... I guess overhaul with the way the school needed to be fixed, and the administrator, the principal here, knew me as a family friend. And he told me, "Mrs. Clayton, I know this is not something you see yourself doing" – cause all my training and everything had been for high school – but he said, "I need your expertise as a high school teacher to come help fix my eighth grade and get my kids prepared for high school." And I believed in his vision enough, what he wanted to do for this school, that I said "Okay." And I said, you know, "I will go on this journey with you" and even though he's no longer here as our principal, I still feel like a lot of us that are still here are carrying out the vision of what he wanted to do for this school. His conviction and vision made me want to lead my classes, my department, everyone with his conviction.

You know, when I was able to implement new things as a department head for our department, you know I found great satisfaction in that because my principal and our instructional coach that we used to have put a lot of faith in me. They let me go to conferences; they paid for me to go. I was very, very lucky; they paid for me to do a lot of speaking at conferences, attending different trainings and bring that stuff back to share with our staff.

I cannot count my success as anything that I've been able to do as individual triumph. My first several years that I was here, we had the most phenomenal administrator. I mean, this is the kind of person that you can ask anybody who was here, they'd say he was a blessing to work for. If you told him, "I really think this would be good," he had the faith and the trust in us to let us do whatever we needed to be and so I felt that I was really able to be an innovator to bring new things to the classroom. He supported whatever I needed to make my teaching current, and to

help do the same thing for my department because he allowed that, and I think that is important not only in a classroom teacher but in an administrator as well, that you have to trust your staff. You have to trust your staff and because he allowed us to do that, we would always say that we were family here and we were the happiest staff in our county, even though we worked harder than any in our county. We were happier and it's because we knew who was at the helm of our ship and we were all going in the right direction.

Our principal made me feel really good about doing that type of hard work and leading my colleagues and students. He found the money for me to do things that we didn't think we had the money to do. And that really allowed us to be able to change the [bad] image of our school because I would take my kids places and people would look at me and say, "Ooh. Where do you teach? These kids are so well behaved." I was able to take the kids with monies he found us out into their community to do service projects and be leaders in their community. People saw them taking leadership roles, and it's because my principal let me take that leadership role in the community and supported us with funds, and his allowing me to model these leadership roles was very important.

Another thing he allowed me to take on, as a leader, was we were the only middle school in [Southeastern State] that had a college fair, like the pro fair they do at high schools. He gave me whatever materials I needed, plus his trust, and we set up booths, and all three middle schools in Winston County would come to our school, the "bad" school, and meet representatives from colleges and universities. It was a huge undertaking and a lot of time, but to get to see these kids' eyes light up, carrying around those college brochures. We live in a small

town and most of these kids never dreamed of college. And our principal – my being able to organize that within the county, being given the responsibility and the trust to do that – well, that’s him.

The truth is, we all have college degrees in our school; we’re all smart. We are all intelligent people. We all have things we’re good at. We all have weaknesses. We all have great ideas, and we’re all for the most part, cause I’ve met irresponsible teachers, we’re all very responsible people and having people that trust us and look for our input,... having that type of support where you feel it’s ok to walk up to the principal and say, “I don’t understand why we’re doing this, I don’t think this is necessarily the best idea,” and not having repercussions that come from that...it’s such a huge piece to any of our success as a teacher-leader. He always gave us that “Attaboy. You know what? I stopped by your classroom today and I saw what you did and that made me feel good seeing you do that with your kids.” It’s important to have the support of my colleagues, too, because we’re all in this together, but to have the support of our administrators, cause at the end of the day they are the ones who have our backs and as a middle grades teacher, knowing that we are all on the same page and that we are all kinda rowing our boats in the same direction. I think it is a key to our success.

Our principal-- the one we lost --used to be good about accolades; he used to send us letters. He even mailed our parents letters telling them that they had done a good job as parents and how proud he was that he was able to work with us. Crazy! One of my colleagues is from South Africa and his parents in South Africa got a letter from our principal about how proud they should be of their son--their adult, grown, 30-something year old son! Stuff like that. Stuff that makes me know... I know that I’m doing a good job, but all I need is that little pat on the back and I don’t mind taking on multiple leadership roles. (September 8, 2011)

Analysis of Mrs. Clayton's narrative identifying supports of middle level teacher-leadership.

Mrs. Clayton's narrative detailed the importance of an administrator to a middle level teacher-leader. In fact, her narrative about the supports of her efforts to act as a teacher-leader centered on the former principal of Collins Middle School. One example Mrs. Clayton shared was of the principal's clear, shared vision for CMS, which he made transparent to his staff and in so doing won over Mrs. Clayton, "His conviction and vision made me want to lead my classes, my department, everyone with his conviction. ... We were happier and it's because we knew who was at the helm of our ship and we were all going in the right direction" (September 8, 2011). Mrs. Clayton felt secure with this particular administrator because she stated everyone knew what they were working for and understood their roles as teachers in this shared vision: "...knowing that we are all on the same page and that we are all kinda rowing our boats in the same direction. I think it is a key to our success" (September 8, 2011). The teachers at CMS, according to Mrs. Clayton, felt inspired by this shared leadership and were braver about making suggestions and taking on the roles of teacher-leaders.

Another reason Mrs. Clayton stated she had support from her former school administration was because they trusted her in her roles as a classroom teacher and a teacher-leader in the school. She stated, "...my principal and our instructional coach ... had the faith and the trust in us ... and look for our input... having that type of support ...it's such a huge piece to any of our success as a teacher-leader" (September 8, 2011). Trust, which gave her autonomy to make decisions in the classroom and as a teacher-leader, was very important to Mrs. Clayton.

This same former principal also provided funding that aided in Mrs. Clayton's professional development as a teacher-leader. She shared, "They [my principal and my

instructional coach] let me go to conferences; they paid for me to go...and bring that stuff back to share with our staff” (September 8, 2011). Mrs. Clayton told about going to conferences and even being a presenter at some, which helped build her confidence and skill as a teacher-leader. Moreover, this financial support allowed Mrs. Clayton to take her CMS students out into the community on field trips and service-learning projects that helped the community acquire a positive attitude about the students and staff at CMS. Finally, the former CMS principal was generous with accolades and praise for the teacher-leaders’ hard work. Mrs. Clayton told how that principal gave “Atta boys” frequently and that he even shared his accolades with teachers’ family members:

He even mailed our parents letters telling them that they had done a good job as parents and how proud he was that he was able to work with us. ...One of my colleagues is from South Africa and his parents in South Africa, got a letter from our principal about how proud they should be of their son! (September 8, 2011)

This left such a favorable impression on Mrs. Clayton that she admitted she never said “No” to any leadership roles asked of her during that principal’s tenure at CMS.

In summary, Mrs. Clayton gladly pursued teacher-leadership roles under the guidance of a principal and his administration, since they supported her by providing a clear, shared vision, trust, funding, and overt appreciation for the job she did.

Mrs. Clayton’s Identification of Barriers to Middle Level Teacher-Leadership

The narrative.

I haven’t been teaching nearly as long as some of my colleagues and I see that dramatic changes have happened in the world of education, things that I have absolutely no control over that are barriers to me being a teacher leader. Finances, the size of my classroom, all of that and

I don't have control over that but I do have control over being an advocate for my children in what I teach them and that at the end of the day, they, and I guess this kinda is the advocate-steward piece together. My kids are going to get what they need, whether it's out of a textbook, whether it's out of something that's current events, that education is always the center of my classroom.

It's hard though. Remember the college fair I talked about earlier? Due to finances, a lot of the colleges weren't able to participate any more, but we had a college fair once that included [public] colleges from all over the Southeast... small private colleges, all the different colleges would come to the school and do like a pro fair. And I wish we were still able to do some of those things but I would call the colleges and they'd say, you know, "they cut their budget for transportation and we can't even go to all the high schools any more so we definitely can't make, you know, make it to a middle school." And it was sad, you know, that because finances have changed, circumstances have changed, and times have changed that we can't do that anymore.

And I think I would say that when the administration changed here, a lot of that went away, too. I think it was the idea that there were really big shoes to fill and they were very hard to fill and so a lot of us had a very hard time adjusting to that leadership because we saw kind of night and day, somebody who was always supportive to having leadership that, you know, made dictatorial statements. That "You're gonna do this," and if I don't understand why, it doesn't matter. "It's my way or the highway." Having that type of leadership, it's been bad. We were often criticized or made to do things, and we weren't told why or when we asked questions, it doesn't matter, you still do it anyways, ...but things have gotten better.

I think one of the worst barriers is perhaps not having the trust of your administration definitely makes things difficult. Or even if you have it, not knowing you have it. Administrators

don't need to live in this kind of box in the front of the school where they don't come out or they don't interact with us because at the end of the day, they're the ones who tell us and direct us and are our guidance and they need...we need to know why we're doing what they want us to do and at the same time, they need to ask for input on how we feel about that. So I think that can sometimes be a barrier when it's like we're in the dark. I don't know why you told me to do this but I have to do it because I know the consequences of not doing it or the idea and we felt like this before...that we better do it because if things don't go well, we're the ones getting thrown under the bus. That fear can definitely be a barrier. Then, there are those outside-of-classroom things...such as, you know, all the things going on with education now...the standardized testing, the emphasis on all of this accountability placed where it's not supposed to be. I'm accountable. My kids are the ones that need to be accountable. Their parents are the ones that need to be accountable, not me. I'm doing my job. Finances. You know, money, you know, people take advantage of teachers. This is the only profession where people get taken advantage of. You tell a doctor to work for less pay and see if he's gonna do it. Or a lawyer, or anybody else. But people know, government officials, politicians, parents, know that at the end of the day, you could cut off my legs, tie my hands behind my back and I would still do my job and all educators are like that. And so they take advantage of us, financially, and that makes it harder to be a teacher-leader. It's okay to raise our insurance premiums. It's okay to tell me I now have to have 35 kids in my classroom even though that's not conducive to learning because we're gonna do it, because we are compassionate about our teaching, and it's very hard, and I think that's what drives a lot of people out of education, cause sometimes those barriers just seem too big. I can't teach as many kids; I can't teach if I don't have any supplies; I can't teach if I don't have any support... I can't teach if all they're gonna make me do is say, "Oh your job will be paid for

performance. Your job depends on your test scores at the end of the year.” I think there are so many barriers to just teaching in middle school, much less trying to be a teacher-leader. May be more barriers in education right now to our efforts to become teacher-leaders than there have ever been before—I really feel that. (September 8, 2011)

Analysis of Mrs. Clayton’s narrative identifying barriers to middle level teacher-leadership.

While Mrs. Clayton did name a non-supportive administration as a barrier to her teacher-leadership in this narrative, she encountered other hindrances too. Money, funding for classroom supplies, and threats to her salary and compensation were concerns she perceived as barriers to her role as a teacher-leader. Additionally, she discussed barriers that were out of the school district’s control, such as statewide accountability for teachers based on standardized testing expectations.

First, Mrs. Clayton described barriers to middle level teacher-leadership presented by non-supportive administrators, stating:

And I think I would say that when the administration changed here...a lot of us had a very hard time adjusting to having leadership that, you know, made dictatorial statements. That “You’re gonna do this,” and if I don’t understand why, it doesn’t matter, “It’s my way or the highway.” Having that type of leadership, it’s been bad. (September 8, 2011)

Mrs. Clayton went on to describe feelings of fear as a result of not having the new principal’s trust. “I think one of the worst barriers is perhaps not having the trust of your administration—definitely makes things difficult...That fear can definitely be a barrier” (September 8, 2011).

Mrs. Clayton also named a lack of funding for school programs as being another barrier to middle level teacher-leadership: “Remember the college fair I talked about earlier? Due to finances a lot of the colleges weren’t able to participate anymore.” Plus, she expressed distress and barriers to teaching and leading due to lack of funds for classroom supplies, “I can’t teach if I don’t have any supplies” (September 8, 2011). Next, Mrs. Clayton described deficiencies in funding her salary and compensation that she perceived as barriers to her middle level teacher-leadership goals. Mrs. Clayton spoke passionately about what she perceived as the exploitation of teachers in regards to compensation and benefits:

You tell a doctor to work for less pay and see if he’s gonna do it. Or a lawyer, or anybody else. But people know ... I would still do my job and all educators are like that. And so they take advantage of us financially, and that makes it harder to be a teacher-leader.

(September 8, 2011)

She continued by stating how difficult it was to teach the way she wanted to with less money for teaching supplies and less money in her paycheck to subsidize her classroom supplies out of her own pocket.

Finally, Mrs. Clayton identified barriers she described as “out-of-classroom” occurrences that she felt powerless to overcome. “Then, there are those outside-of-classroom things...such as ...all the things going on with education now...the standardized testing, the emphasis on all of this accountability placed where it’s not supposed to be” (September 8, 2011). She further elaborated on the harm that raising the class size cap has done to her daily efforts to have meaningful contact with individual students and those who are struggling because the time simply does not exist when divided among larger pools of students.

In summation, Mrs. Clayton identified the following as barriers that inhibit her efforts to be a middle level teacher-leader: non-supportive, mistrusting administrators; lack of funds for school programs; higher or non-existent class size caps; threats to her salary, benefits, and compensation; and unrealistic accountability requirements for teachers.

Ironically, some of the same factors that Mrs. Clayton identified as supports of her efforts to be a middle level teacher-leader she also named as potential barriers to her efforts to lead.

Table 4.1 provides an at-a-glance view of the supports of and barriers to Mrs. Clayton's leadership efforts.

Table 4.1

Mrs. Clayton's Perceived Supports of and Barriers to Middle Level Teacher-Leadership

Supports	Barriers
A site-based administrator who is transparent about his goals and vision for the school with his staff	Non-supportive site-based administrator
Funding for professional development and classroom supplies	Lack of funding for classroom supplies and professional development
A site-based administrator who trusts his teachers and gives accolades to his teachers and recognizes their accomplishments publicly	Threats to teacher's salaries and compensation based on unrealistic accountability demands
	Standardized testing demands on teachers' time and its ties to accountability
	Non-supportive parents

Mr. Milo's Teaching Philosophy

Mr. Milo differed from the other four participants in the study because he did not begin his career as a teacher, and he did not earn his teaching certificate until he retired from his first career in business. As a result, his middle level teaching philosophy, particularly as it pertains to being a leader, has been influenced by his experiences as an executive. Moreover, Mr. Milo

shared that his own battle with dyslexia has helped him shape instructional strategies he can use to help his struggling students and imbued in him a passion for reaching as many young adolescent students as possible.

The narrative.

I believe that learning is a continuous process throughout our lives. Most of the students that come into my classroom expect someone to teach them; they take no responsibility for themselves. I teach my students to take responsibility for their own education by helping them to discover how they as individuals learn and by giving equal value in grading to the learning process and the assessment of the knowledge retained.

I think of myself in some ways as an innovator because I wasn't...I didn't go to school to be a teacher, so I don't feel as indoctrinated, and I don't have as much of a vested interest in doing things a certain way so when someone tells me they did something a different way from the way I did, I will look at it and look at their results. If their results were better than mine, I want to try it. I want to know all I can find out about it. But I don't feel just because the other two science teachers here in the hall are doing two different things from what I am doing, I don't feel that my students are lacking for that because I may be doing it in a different way that suits my teaching style better. And I'll give an example: Some teachers are better at getting up in front of the class and imparting their wisdom to that class. My experience is that sixth-graders don't want to listen to my wisdom, so I try to teach them different ways of learning the same material to find what works best for them. I'm not trying so much to find out— so what I do is, I do use the things that I have learned, the way people learn. We read the book, and I force the kids to track and by tracking, I can tell who had followed along and who isn't and I'm not above disciplining a student for not tracking. And they say well you can't discipline them for not doing work. I can

discipline them for not doing what I've asked them to do, and I call it defiance, and sixth-grade students are all about pushing the envelope and all about being defiant and seeing where that line is. My line is pretty short. I show videos. I use interactive tools where the students are both learning, answering questions and exploring. We do research, and I teach them the basics of how to do research to find out the answers for a report that's based on all of the EQs [essential questions] for the area we're teaching. So that, you know, they are doing learning in multiple ways. Not all of them are going to learn in each of those ways, but they all need to learn what it is they need to do to learn. And that's pretty much what I tell them and their parents is my goal is that when they leave my class, I want them to be able to say, "You know, I saw this on TV the other day. I wonder how that works?" And they're gonna know how to find out and learn them for themselves, and if I can teach them that, to me, that's more important than the actual subject that I am teaching.

I can take you all the way back to when I was in elementary school. I'm dyslexic. I didn't learn to read until 3rd grade. I wasn't reading on level until 7th. I read a newspaper every single day. I read at least one book a week plus all the things I read for school, but I do that so I can keep my skill up. If I...like during the summer, if I don't read the paper every day, and I don't keep a book in my hand all the time, I struggle to read because I'm severely dyslexic and reading is something that is very hard for me so I have to keep my skill up, but that makes me more sympathetic and better at helping kids who struggle in reading, and they can open up to me because I admit to them that I struggled to read. And I remind them that "Look around the classroom at the people that you see that can read, and you know they can read, and they don't have a book with them,"— that the person who can read but doesn't has no advantage over the person who can't read. No advantage at all. The kids I've got that...we read out loud in class.

They struggle with the words. I struggle with the words, too. I took speech therapy when I was a child because I stuttered. I've never forgotten what that felt like and it makes me a better teacher for it. (November 10, 2011)

Summary of Mr. Milo's teaching philosophy narrative.

Mr. Milo by his own definition is both an advocate and an innovator. He has struggled all of his life with a learning disability: "I'm dyslexic. I didn't learn to read until 3rd grade. I wasn't reading on level until 7th" (November 10, 2011). However, having dyslexia actually made Mr. Milo a more sensitive teacher who advocated tirelessly for his students. "I try to teach them different ways of learning the same material to find what works best for them. I'm not trying so much to find out, so, what I do is I do use the things that I have learned, the way people learn" (November 10, 2011).

Additionally, Mr. Milo demonstrated his innovation by listening to other teachers and not feeling threatened if their teaching method was more successful than his had been.

...so I don't feel as indoctrinated and I don't have as much of a vested interests in doing things a certain way so when someone tells me they did something a different way form the way I did, I will look at it and look at their results. If their results were better than mine, I want to try it. I want to know all I can find out about it. (November 10, 2011)

In a way, Mr. Milo's nontraditional educational background made him more receptive to trying other teachers' ideas and taking their advice to improve his own practice.

Mr. Milo mixed high expectations and a "no excuses" approach to create a successful middle level science classroom, demonstrating both advocacy and innovation. He believed it was his job to work until he found the best way for the students to learn and he adjusted his lesson plans daily to accommodate his young adolescents' needs. "You know, they are doing learning in

multiple ways. Not all of them are going to learn in each of those ways, but they all need to learn what it is they need to do to learn” (November 10, 2011). Mr. Milo used his own insecurities as a student with a learning disability to inspire a variety of engaging instructional strategies to use with his young adolescents, as if he was a teaching veteran of many years.

Mr. Milo’s Identification of Supports of Middle Level Teacher-Leadership

The narrative.

That’s...actually kind of hard because I still don’t feel like I am a teacher-leader. Others ask me to do jobs for them. They’ve asked me to serve as a [team] leader. I’ve been asked to serve as the head of the science department. I’ve been on the principal’s leadership team, but sometimes I think they only turn to me because I look like I have so much experience when I really don’t. That I have learned so...I learn from everybody I work with on almost a daily basis. I do have a lot of management experience. I’ve been responsible for hiring and firing people all over the country and doing their jobs while I fired one person, do their job while I hire someone else and train them to take that position within an insurance company. And basically the main thing I found was that you don’t tell people how to do a job; you make them responsible for the job. You tell them what goals you want them to achieve and ask them to come back and tell you how they are going to achieve it. That, if you want someone’s buy-in, then they have to make the decisions about how they are going to achieve their goals. That’s the easiest way ...and school systems do this...the easiest way to alienate your employees is to tell them how you want them to achieve their goals. I have to believe in the goal in order to make the commitment of my time. I must be able to visualize the achievement and realize its value.

Actually, I think one of the reasons I don’t think of myself as a teacher-leader is because I have no aspirations towards being anything more than a classroom teacher. If they were to ask

me what I want, I want to be able to come into my classroom with my students and close the door and not be bothered by anyone else. But I know that's not possible and it is my nature, as my wife says, it's the nature of most men...I want to fix everything I see that's a problem even if my reaching out to help someone fix that is not what they want me to do. (September 15, 2011)

Analysis of Mrs. Milo's narrative identifying supports of middle level teacher-leadership.

Mr. Milo used his managerial business background to describe what a school system's district and site-based administrators should do to promote middle level teacher-leadership:

...you don't tell people how to do a job, you make them responsible for the job. You tell them what goals you want them to achieve and ask them to come back and tell you how they are going to achieve it. (September 15, 2011)

Mr. Milo even provided a suggestion for the administration's support that he would like to see. He stated that both at the district level and at the school site, administrators should not tell teacher-leaders *how* to reach their goals, but rather should share the goals with the teacher-leaders and allows them to create action plans on their own. "I have to believe in the goal in order to make the commitment of my time. I must be able to visualize the achievement and realize its value" (September 15, 2011). In other words, he considered autonomy an important support for him as a middle level teacher-leader.

Mr. Milo's Identification of Barriers to Middle Level Teacher-Leadership

The narrative.

There used to be a little sign over my doorway and over my computer here at the school that said MYOB— mind your own business--as a reminder to me that sometimes I need to mind my own business. But I think in some ways, the reason they have asked me to be head of this and

head of that is that I will speak my mind. I have no fear about it, It's more of a let the chips fall where they may, and sometimes they have. I've only had one NI [Needs Improvement on a teaching evaluation] in my whole experience at Collins Middle School and it came at the end of my first year. And after all of my observations and my meeting with my administrator, I had never gotten a single NI until my last evaluation, the annual evaluation and I got an NI from my administrator because he said I didn't get along with the administration at the school. And I asked him why he said that and he says, "You're constantly challenging me. You're constantly challenging the administration in meetings." And, to me, I was never challenging them, I was asking them why we were doing something a specific way because I didn't have any experience and didn't know why they were doing something in a specific way but I guess my tone of voice.... And some of the other teachers said, "You ask something as if they work for you. You asked them things as if you are their superior." I said, "Well it's not intended to be that way. It's intended to be because I don't know what's going on." I don't have enough experience, but my presence among a lot of other adults...they tend to say, "Yes sir" to me, even when they ought to call me by my first name, but it has to do with the years of being in charge. I mean, I have walked through and run the safety for large construction projects like the...Dome [professional sports stadium], the expansion of the airport where I've got over 1000 employees out there, and I'm running the safety program. And they have to do what I tell them to do and get their cooperation and let them know I have the authority. And that tends to come across even when I don't want it to or when it's not intended, but my one point at the end of that was that I got my first NI on that evaluation at the end of the year. And my response to it in writing at the bottom of that sheet was that as a manager, I personally would never give somebody a NI for something that I had never talked to them about and had never given them a chance to change. If you're telling somebody in

their job in their evaluation that they are deficient in a certain area, you should have told them a long time ago and given them the opportunity to improve that situation or change that situation. You don't tell them at the end of the school year after everything else they have done that year was fine and dandy, no NI's, everything met or exceeded and then at the end of the year, they get an NI because you asked them questions.

I also think that that administrator who slighted me so badly that first year was one of the best administrators I have ever worked for and I would leave this school to go work for him again. Do I think he was right all the time? No. Do I think he was one of the best administrators I have ever worked for? Yes. And I can separate those two things because I don't hold a grudge against him. But he should never have done what he did, and he did it because he didn't have enough management experience. It was his first year as an administrator, and he had never been an administrator before, and he.... Until he read what I had put down, he wasn't able to see it from another point of view and I asked him, you know, even though nothing was going to change, I asked him later. I said, "How would you have felt at the end of your first year if your administrator had done that to you?" And he said, "I would have felt the same way you did." And he knew he was wrong to have done it that way. Was he right about me challenging him? In his eyes, "Yes." Was I trying to challenge him? No. Did it come across that way? Probably.

I think what makes it difficult is scheduling, more than anything else. The way, and I know we try a lot of different schedules...but like my [team] has a separate connections time and separate planning from the other two [teams] here on the hall so that is very conducive for me being a [team] leader and for us meeting and we have our conferences in the mornings with parents and this has been really great for us. But, I'm also head of science for 6th grade, and the other two science teachers and I hardly ever see each other because after school, you know, we

are doing detentions on different days, you know and all the other things that go along with it. We have a very hard time, I feel...for me...fulfilling that role. I mean, we have... Mondays are gone, Tuesdays and Thursdays, I teach in the after-school program at 3:30 so my time is very short between 2:45 and 3:30 to get anything done, scheduling more than anything else. The paperwork...I feel like we drown in paperwork, and I know that's the name of the game in many cases. I come from an insurance background. Paperwork ruled the world, and you haven't done anything if it's not documented—literally. You never visited anyone, you didn't go anywhere, you didn't have a thought in your head if it wasn't documented. I think I could probably teach for a month without a lesson plan. I couldn't have done that my first couple of years, but I could do it now because I know my subject, but my lesson plan can really almost change on a daily basis based on what we did yesterday, how far we got through it, whether my kids understood it, whether something came out yesterday in a discussion that showed I hadn't spent enough time in another area that I need to go back to and it's just, you know, trying to keep all my classes somewhere close together is really hard, especially when two of them are gifted and two aren't. But, that's the challenge that I can meet, you know, but is it a detriment to us being able to do the things that you might want to do as a leader? Yes. (September 15, 2011)

Analysis of Mr. Milo's narrative identifying barriers to middle level teacher-leadership.

Mr. Milo articulated three factors he saw as barriers to his efforts to be a middle level teacher-leader. The first barrier Mr. Milo described was the antithesis of the autonomy he named as a support—that of the micromanaging district or site-based administrator(s). He shared, “The easiest way to alienate your employees is to tell them how you want them to achieve their goals” (September 15, 2011). Mr. Milo shared that he believed teachers would take on more leadership

roles when they could “buy in” (September 15, 2011) to a school system’s goals if they were allowed the autonomy to reach those goals using methods and ideas that they had developed in their own ways as teachers.

Issues with scheduling ranked second on Mr. Milo’s list of barriers to his efforts to act as a middle level teacher-leader. He expressed a great deal of frustration over impediments such as non-common planning times for team members, non-common planning times for fellow science teachers, and too many afterschool duties that took up available planning time for teachers. “I think what makes it difficult is scheduling, more than anything else. . . . the other two [sixth grade] sciences teachers and I hardly ever see each other” (September 15, 2011). At the time of the study, Mr. Milo was also serving as the Science Department Chairperson, and he expressed similar dismay over a lack of common time for science teachers at CMS to meet and plan with their peers.

Thirdly, Mr. Milo described frustration over the amount of paperwork he encountered as a middle level teacher and teacher-leader.

I feel like we drown in paperwork, and I know that’s the name of the game in many cases. . . . that’s the challenge that I can meet, you know, but is it a detriment to us being able to do the things that you might want to do as a leader? Yes. (September 15, 2011)

While it seems paperwork was unavoidable, Mr. Milo exhibited some skepticism that all the paperwork he was required to do was both necessary and the best use of his time in regards to what he could be doing instead, such as planning more detailed lessons or sharing ideas with his peer teachers.

Mr. Milo perceived a lack of autonomy in meeting goals to be one barrier to his efforts to be a teacher-leader. Mr. Milo also identified time constraints brought on by conflicting schedules

and after school duties, plus excessive paperwork as creating barriers to his efforts to be a middle level teacher-leader. He expressed that he felt his efforts to be a teacher-leader were not taken seriously and shown respect because he was often pulled from leadership activities due to paperwork or he had scheduling conflicts.

Mr. Milo had short but specific lists of supports and barriers that he perceived affected his efforts to act as a middle level teacher-leader. Table 4.2 summarizes his comments.

Table 4.2

Mr. Milo's Perceived Supports of and Barriers to Middle Level Teacher-Leadership

Supports	Barriers
Site-based and district level administrators who trust teachers to do their jobs	Lack of autonomy for teachers to decide how to achieve goals
Site-based and district level administrators who share their goals for an individual school and an entire school system with their teachers	Scheduling conflicts that prohibit teachers from common teams and subjects to have common planning time
	Time-consuming paperwork

Mrs. Blush's Teaching Philosophy

Mrs. Blush shared her teaching philosophy, a philosophy that seemed to highlight her love and enthusiasm for teaching science to young adolescents. She possessed a strong background in science education and she described her adventurous pursuit of highly engaging lessons to impart a similar love of science to her middle school students.

The narrative.

Well this is my 19th year I have been teaching, and all 19 years have been in middle school. I taught—my degree is in agriculture education, so I taught my first eight years I taught agriculture, and then because of all of the demands outside of school, and the fact I had a small child, I taught art for the next four years. And then, I decided I wanted to teach in the same

system where my child went to school because it's...I knew it would make life a lot easier so that's when I came here and I always knew that if I taught an academic subject, it would be science, that just seemed like a good time. I was changing systems, changing everything; that would be the best time to make that change as well. So, this is seven years I've been teaching science here.

And this is a second year in a row that I have been chosen to be grade-level leader so I think that says something about my leadership ability, and as it's been these last two years. I pushed myself then because it was something new and it was something that I wanted to do and I wanted to do a good job at, and I think that that made a difference and that made me stand out. And the one thing that...an administrator told me one time that they always liked about me and one of the reasons that I was chosen to be a leader was because if there was a situation or a problem, that I didn't just come with the problem, that I would come with some solutions, some possible solutions, to try to offer some, you know, "This is what's going on, but can we do this to try to fix it or...?" That was one of the biggest things.

I definitely think I am an innovator I think because, for me, I like to try new strategies and that's the way, it makes it interesting and makes it fun, and that's the reason I like teaching science because, how many activities do you get to do. You get to cut up liver and use it for an experiment or you know, go outside and blow things up and make noises and you know. We get really creative and we're learning about physical and chemical changes. One of the things we do is make...we use candles and make S'mores because there is parts of the physical and chemical changes involved in that so it's just,,, The biggest thing is trying to come up with things that aren't...the kids aren't used to, and I think that makes...it makes learning fun and sometimes I think the key is to really getting students is they have to learn without knowing they are learning

something. I include as much technology as I can get my hands-on, too. Like they love working on the SMART board. I think that's one of the keys--that they have to learn without knowing it. And, I think because of that, I don't have a whole lot of discipline problems because the kids enjoy coming in here and because we do so many activities and so much fun stuff and it's like I always tell them, there are days where, every Monday they know we have vocabulary and then we have some workbook pages. Mondays are boring days and they know that but it's not an issue because they know there is something else fun coming up.

I'll get an email or a letter or something from a student even one that I taught many years ago, and I think it's just...knowing that to somebody, you made a difference, because I had...when I was teaching agriculture in middle school, and we were very involved with FFA, (Future Farmers of America) and with our animals, and I had a kid that told me that because the love he developed for, the FFA program and all the things we did, that's what kept him in school when he went to high school because of what he was involved in middle school, that he stayed involved in high school and that was the motivation for him to not drop out of school because he wanted to be able to be involved and that's just, you know...it's things like that that just make whatever else happens, it makes it worth it. There are kids that come through that I know I don't ever, ...next year they won't remember who I am but, for those that you do, there is no better feeling and that's why, I became a teacher, was because you just want to make a difference and...there's just no better way to do it.

My relationships outside of school and the way I deal with other....cause it's like this isn't something that I come here from, 6-whenever and then when I leave, I'm done. You know, it's like being a teacher is one of those things you always are but I think it helps me in dealing with my own son and, other people in my life outside of school because you definitely learn

patience and just how...I don't know., I don't think there's anything that could happen that I couldn't deal with, you know? Because this job is so unpredictable and you never know from one day to the next or one class period to the next what's gonna happen. And I think that this job prepares me outside of school how not to freak out if something happens, but I think it's just not something you can turn off when you leave here. It's like when I'm out in public somewhere and I see a kid or hear a kid doing something they are not supposed to, it's like I want to tell them to stop because it's just such habit. It just comes from caring about, kids and other people in general, and I think that's one thing it intensifies relationships because and this can be very emotionally draining when you hear some of the stories, the things that the kids have to deal with when they're not here and sometimes it's no wonder they come in here and they can't focus on these vocabulary words or writing this essay because they don't know when they leave, where they are going or what they are gonna eat or what they are going to do. They have so much outside that they have to deal with, that we have to remember that, for a lot of these kids coming to school, that's the most important thing, getting through their day but for a lot of these kids, they have so many other adult issues to worry with when they are not here and I think that just makes it difficult for them to...to be able to focus while they are here. (November 15, 2011)

Summary of Mrs. Blush's teaching philosophy narrative.

Mrs. Blush was a positive, proactive middle level teacher-leader. She was respected by her peers who chose her to be their grade level chairperson: “And this is the second year in a row that I have been chosen to be grade-level leader so I think that says something about my leadership ability” (November 15, 2011). Her administrators equally admired her and she shared one's comment, “... administrator told me ... if there was a situation or a problem that I didn't

just come with the problem, that you know, I would come with some solutions” (November 15, 2011). Mrs. Blush seemed justifiably proud to be considered a problem-solving leader by her peers and administrators.

Mrs. Blush strove to be an advocate for her students, by recognizing their educational and emotional needs and trying to meet those. During her career she had the pleasure of receiving validation from students whose lives she had positively influenced through her advocacy, and she shared, “I’ll get an email or a letter or something from a student even one that I taught many years ago and I think it’s just...knowing that to somebody, you made a difference” (November 15, 2011). According to Mrs. Blush, it was this kind of reinforcement from students that prompted her to be such a passionate advocate and leader among her peers on behalf of young adolescent students.

Mrs. Blush was an innovator in her classroom because she was always investigating new technology and instructional strategies to engage her students. She really cared about teaching her students to love science and she stated:

trying to come up with things that aren’t...the kids aren’t used to and I think that makes...it makes learning fun and sometimes I think the key is to really getting students is they have to learn without knowing they are learning something. I include as much technology as I can get my hands on too. (November 15, 2011)

Mrs. Blush was constantly searching for unusual experiments and new technologies and inspiring software for engaging her students. She volunteered to pioneer the use of any new science programs, equipment, or programs that was receiving favorable reviews from fellow science educators anywhere. Mrs. Blush’s willingness to take the lead in the role of an innovator equally benefited her students and her peers.

Finally, Mrs. Blush exemplified stewardship for her profession by being an outstanding teacher-leader who really cared about teachers, and in her community created positive reflections of the best in teachers. Mrs. Blush discussed her image in the community and that she is conscious of the importance of maintaining a professional and ethical reputation. In referring to dealing with situations outside of school, she talked about the importance of “my relationships outside of school” (November 15, 2011). She added, “I wanted to do a good job at and I think that that made a difference and that made me stand out” (November 15, 2011). Whenever Mrs. Blush found herself facing a challenging situation outside of school, she viewed it as an opportunity to use her patience and skill as an experienced middle level teacher in positive ways.

Mrs. Blush’s Identification of Supports of Middle Level Teacher-Leadership

The narrative.

Well, I definitely feel supported, not only from my peers in the grade level but also from the administration and even with a lot of changes in the administration. I’ve always felt supported but I think definitely, it’s nice if there’s an issue going on on the hall and that I’m the one that somebody comes to to be able to work out a solution and um, I can’t imagine I mean because and you know the three other teachers that I work closest with, just because we have been together before and...with one, we’ve been teaching together for six years so six of my seven here, we have been together and it’s just...you learn how to just how to work together and it makes a big difference. (September 29, 2011)

Analysis of Mrs. Blush's narrative identifying supports of middle level teacher-leadership.

Mrs. Blush got right to the point when describing those factors that supported her efforts to be a teacher-leader: supportive peers and site-based administrators, and how they all work together:

Well, I definitely feel supported, not only from my peers in the grade level but also from the administration... we have been together and it's just...you learn how to ... work together and it makes a big difference. (September 29, 2011)

Mrs. Blush described what to her was the supportive philosophy inherent in middle level education – teamwork (Alexander, Williams, Compton, Hines, & Prescott, 1969; Jackson & Davis, 2000; National Middle School Association, 2010). She embraced her role as a middle level teacher-leader believing that if she worked with her team of peer teachers and site-based administrators for the good of the young adolescents in their care, she was leading successfully. As long as she perceived support from her peers and her administrators she was comfortable assuming the role of teacher-leader formally (such as team leader and Grade Level Chairperson) and informally (such as advocate and innovator in her classroom).

Mrs. Blush's Identification of Barriers to Middle Level Teacher-Leadership

The narrative.

Well, I think we come up with ideas, whether it's me you know when we're discussing things at a grade level but it seems like the one thing that always is standing in the way is money. I think that's the biggest thing because as far as policies or rules and things like that, the administration is very supportive if we want to make a change to something or do something different. They are very supportive of that, but we come up with these wonderful ideas, but

money and budget is often an issue cause I think there are things that these kids need, but there's just, no money and that's, you know...Some of them never experience anything outside of where we are, you know? I saw the school. We're living in a small town, and there are experiences that would be beneficial. And we all know how much money teachers spend out of their own pocket because in science, with some of these labs, there's a lot of the materials we buy ourselves, but that's a decision I make because I think it's important for the kids to be able to do some of these activities, but.... I don't think I should have to. I think that education is just not important the way other things can be and you know I honestly believe that they can cut budgets and they can take things/programs away and give us furlough days because they know we're gonna do what has to be done regardless just because this is not a job you do if you don't love the kids and love what you do. I mean, this is not the kind of job you could muddle through just because you want a paycheck. You have to love it and I think that's why, people that make these decisions know that if the teachers are worth anything, they are going to do what has to be done regardless of how much of their own money or their own time it takes. (September 29, 2011)

Analysis of Mrs. Blush's narrative identifying barriers to middle level teacher-leadership.

Mrs. Blush named lack of monetary resources as the greatest obstacle to her efforts to be a middle level teacher-leader. "We come up with these wonderful ideas but money and budget is often an issue.... I think there are things that these kids needs but there's just no money" (September 29, 2011).

Mrs. Blush continued by reiterating that even when teacher-leaders received support from their site-based and district administrators a lack of funding undermined progress.

Mrs. Blush also identified a barrier that she perceived as disrespect for teachers and education in general, stating:

... [to society,] education is just not important the way other things can be and I honestly believe that they can cut budgets and they can take things/programs away and give us [teachers] furlough days because they know we're gonna do what has to be done regardless just because this is not a job you do if you don't love the kids and love what you do... (September 29, 2011)

Like Mrs. Clayton, Mrs. Blush stated that society seems to take teachers for granted. "...if the teachers are worth anything, they are going to do what has to be done regardless of how much of their own money or their own time it takes" (September 29, 2011). Mrs. Blush continued saying that because society expects teachers to use their own money to supply classrooms with needed resources, it is not necessary for society to identify ways to fund schools. She was visibly frustrated with this perceived societal attitude, closing her hand into a fist while discussing the topic.

Table 4.3

Mrs. Blush's Perceived Supports of and Barriers to Middle Level Teacher-Leadership

Supports	Barriers
Supportive peers	Lack of funding for classroom supplies and activities to enhance student learning such as field trips
Supportive site-based administrators	Disrespect of the teaching profession from society as a whole
Teamwork among everyone (e.g., teaching teams, within departments, teachers and administrators)	

Mrs. Coco's Teaching Philosophy

Mrs. Coco immediately made an impression on me during the first interview because her warmth and enthusiasm for teaching young adolescents were effervescent. Mrs. Coco shared that she began her educational career in guidance counseling and special education, a history that seemed to saturate her teaching philosophy with descriptions of the ways she attempted to meet the emotional needs, as well as the educational needs, of her students.

The narrative.

My philosophy for teaching is that you not only must have a love for education in terms of learning, expressing, exploring, etc., but you must have a love for the children you teach regardless of any situation. Teachers can have bad days and that can affect the child or even the class at times if not careful. In return, a child can have a bad day, and not only can it affect the teacher, but most of the time it can affect the class as a whole. Regardless of the moods that teachers experience, I believe we should do our best to turn any situation into something positive for all. With trying times like those can be, it is hard to maintain our love for the children we teach. As humans, we sometimes hold grudges and start to single out students in order to label them. I do not believe in labeling any child. I believe if you love what you do, you must love the children you teach regardless. I didn't go into education because I just love to teach. I decided to teach because I love children, all children. It is not just the teaching that the state requires, but more so, the teaching that I do that is not all about the standards. It is really getting to know the children in all the areas of their lives: likes, dislikes, dreams, goals, strengths, weakness, family, fears, etc. I teach because of love. I teach because I care. I teach because every year, I pray for children of my own, and every year, I am blessed with as many as 120 of my own to teach, care for, share with, and love. No one is perfect, and it is easy to forget why someone became a

teacher in the first place. That is why I try to remind myself every day of every year I teach. To do that, I teach my students—one philosophy I have about people in general—I tell my students the first day of class: “You may not like everyone, but you must love everyone.” I say this because it is not the child that we start to have doubts about and dislike but the actions. You can’t change the child, but you can modify the actions. A child is a product of his or her environment. Well, I want to make sure that my environment for the students I teach is well supplied with love, warmth, creativity, discipline, exploration, commitment, encouragement, and learning. This may only serve the child for the time that they are with me, but at least I can try to make a difference for just that time. There is another quote I live by as I teach. I am not sure if it is just something I have said or if I read it somewhere, but “To teach is to love a child.”

I consider myself an innovator first; I find myself wanting to use different things. I know that we have structures that they’re expecting us to do in classrooms and certain ways but I find because kids don’t learn the same, you know. Kids that come up from year to year the same, I have to use different approaches. One of the things I use is humor as a big thing to get kids to open up. I’ve got kids who normally may give someone else a problem or they don’t do stuff in other classes but you know, trying a different approach and how I respond to them seems to help. And I know much more than just my personality or my attitude toward a student, there’s much more with, you know, being an innovator as you put it. I’m willing. I want to bring more things in. I want to make it more hands-on, more tactile, more, you know, for the kids to play with and enjoy, not something that they’re just gonna stare at a wall or hear me talk about. I want them to really feel what’s going on. You know? Go home and look and go, “Hey, this is what this is. This is what this is and start identifying and putting things together and linking it together. The second kind of teacher-leader I am is an advocate. I’m all about trying to preserve what we

have. I don't think we need to reinvent the wheel when it comes to working with kids or with our education system, but I think, you know, I just think that we have to be there to say, "Hey, let's try this. Let's work with this. Let's give this a chance. Give these kids a chance, you know, to see if it's gonna come out before we start monkeying with the wheel so to speak, as some do. But I think those are two areas that I would fall mostly into. (November 14, 2011)

Summary of Mrs. Coco's teaching philosophy narrative.

Mrs. Coco was passionate when she described her teaching philosophy and roles as a middle level teacher-leader. To her, it was all about heart. Her heart belonged to her students, and so she advocated for them tirelessly stating, "My philosophy for teaching is that you not only must have a love for education in terms of learning, expressing, exploring, etc., but you must have a love for the children you teach regardless of any situation" (November 14, 2011). Mrs. Coco believed that no matter how difficult the child's behavior, a teacher must truly love all students to be the best he or she can be as a teacher.

This same love for the children she taught inspired Mrs. Coco to be an innovator, who kept them engaged in a variety of learning activities in her classroom. During the interview Mrs. Coco enthused,

I consider myself an innovator first; I find myself wanting to use different things. ... because kids don't learn the same...., I have to use different approaches. ... I want to make it more hands-on, more tactile, more... for the kids to play with and enjoy....

(November 14, 2011)

According to Mrs. Coco, one of the worst crimes middle level teachers could commit was to bore their students thus missing the opportunity not only to engage them in learning, but also failing to make authentic connections that would further the students' overall engagement in school.

Mrs. Coco clearly loved being a middle school teacher. She expressed her love for her students and her work by agreeing to hold teacher-leadership positions at Collins Middle School. Although she did not identify herself as a “steward,” according to research (Jackson & Davis, 2000; Phelps, 2008; Zepeda, Mayers, & Benson, 2003) she was the best kind of steward for middle level teachers because she focused her efforts on improving her school by modeling a positive, professional example.

Mrs. Coco’s Identification of Supports of Middle Level Teacher-Leadership

The narrative.

I would say that was probably back, probably after I’d been teaching a couple of years, that I first felt supported as a teacher-leader. I felt like that not only were teachers coming to me for things and students were looking to me to help them, but administrators were more like knowing that I was there if they needed something. They knew who they could come to. It was when I was at one of the other middle schools here in Winston that that was happening. I had a great relationship with the administrative staff and by having a good relationship with one of them, it had grown with the others, and it just, it felt really good to be given the chance to suggest ideas, be able to go with things, and not be taken for granted for it or pushed to the side like I didn’t know what I was talking about. It was really good.

Actually, when I think more, it was right after I’d probably been teaching a little over a year that I had my first supportive moment. Our special ed. coordinator from the board office, Sue Smith (pseudonym), had come in and I had met her the first year, and she was with me the second year checking on and seeing how things were doing, and I was just really impressed with her my first year that she came in and she was so willing to be there, and she was, you know, she always opened herself up and said, “I’m here if you need me,” but she was glad the fact that I

took initiative for myself. I wanted to find the answers for myself. I wanted to do the work for myself and only if I hit a dead end, would I go to her for something. She taught me so much and I know a lot of people complained about her, but I really did like her. And one of the things she did that made me feel really good is that she felt like if I had already finished my certification and finished my one-year practicum, that she felt like I would be a good mentor for other special ed. teachers to show them how to be structured, how to be organized and how, you know, to look at different methods of working with kids and stuff and so that did make me feel really good, especially since I was so new and she was in a very big position to me so it made me feel really good.

And then of course there's other things... little things that we would like to do on the hallway or we would like to do within the school that everything has to come down and of course our administrator's really good about letting us do certain things. I know from other schools there was like, "You can't do this unless we have this filled out, and it goes to the board office, and it does this." Well, our administrator is a little bit freer there. She helps us out a little bit more, and that's good.

Hmmm. I think this year I felt like I've had more support the more years that I've been here at this school. I've seemed to be getting more support than when I first came here. A lot of it I know is the bridges that I'm building with the teachers around me, not just my team and not just the teachers that I share a subject area with but with others because we get together and we discuss the things that we want to see happen on the hallway, what we don't want to see happen on the hallway...and we try to do it together so that it kind of appeases everyone for the most part, but above all, it's for the good of the kids, especially. (September 30, 2011)

Analysis of Mrs. Coco's narrative identifying supports of middle level teacher-leadership.

Mrs. Coco identified validation and support that came from district office administrators as providing her with valuable support in her roles as a teacher-leader. She shared:

...special ed. coordinator from the board office, Sue Smith (pseudonym) made me feel really good ... She felt like I would be a good mentor for other special ed. teachers ... She was in a very big position to me, so it made me feel really good. (September 30, 2011)

Mrs. Coco described how empowered she felt after Ms. Smith's confident assertion that allowed her to mentor other special education teachers. According to Mrs. Coco, it was this first experience with an administrator's support that inspired her to try as many teacher-leadership roles as possible during her career.

Mrs. Coco also identified validation and support from her site-based administrators as valuable to facilitating her enactment of the role of teacher-leader. On the subject, Mrs. Coco had this to say:

I had a great relationship with the administrative staff and by having a good relationship with one of them, it had grown with the others... It felt really good to be given the chance to suggest ideas, be able to go with things and not be taken for granted. (September 30, 2011)

She reiterated that she enjoyed accepting roles and leadership duties because she perceived her site-based administrators as supportive. Their positive accolades inspired Mrs. Coco to work harder for her students and the school.

Finally, Mrs. Coco identified her peers and her students as supports of her role as a teacher-leader. She stated, “I would say that ... probably after I’d been teaching a couple of years that I first felt supported as a teacher-leader. ... Not only were teachers coming to me ... students were looking to me to help them...” (September 30, 2011). Mrs. Coco enjoyed building bridges between herself and co-workers, as well as between herself and her students. She indicated that her roles as a teacher-leader were only successful when she had the support of her peers and her students.

Mrs. Coco’s Identification of Barriers to Middle Level Teacher-Leadership

The narrative.

I have to say it was not a pleasant memory. I remember having an administrator, and it was during that time that I was telling that I was at a school where I seemed to be appreciated by the administrators and it was very....It was a good feeling. But this particular morning, I was looking in the hallways. I was on the 6th grade hallway, and I would see the kids as they come off the bus first and come in down the hallway. And I remember that morning that we’d already been told that our two APs were off campus and so it was just our administrator and course it can get busy and it can get crazy. Well, just as these two girls had entered the sixth grade hallway, and they were not even sixth graders of course. The way they had to come in...they got into a fight. Well, I immediately leaped over there. It seemed like I leaped over this kid at a locker. I don’t know how I got over there, but I got over there, got them separated, and got them to the front office. And I remember the administrator was there, and of course the front office is crazy in the morning times, and I’m aware of that. And you know, I didn’t know exactly what to do with the kids because I knew the APs were not there, and they would normally handle it, and I couldn’t just leave them unattended at the front office, and so I was standing there, you know,

waiting to see what I needed to do and in mid-sentence, I was making a remark to Mrs. Logan (pseudonym), which was the administrator. I said to her, you know I was saying to her, "Mrs. Logan, I know the APs are not here. What would you like me to do with these two kids?" And in mid-sentence, she started out just as I said, "Mrs. Logan,....", she said, "Just leave 'em here." Well, of course, I was already in thought and it was such a very short sentence that I just you know, it was natural to just push it on out. And she just looks at me, and she, with a strong tone and a strong face, just looks at me and says, "I said just leave 'em here!" And of course, I knew that she could not handle pressure very well, that her administrators, her APs were very supportive in helping keep pressure off. I knew she spent a lot of long hours there so that she could do work without being pressured by anybody else being there. I just knew she was not one that could handle pressure. And it really hurt my feelings, to the point that, you know, I actually came back down the hallway, and I teared up. And I knew it was not personal. I knew that she was overwhelmed with what was going on, and her APs were not there, and now these two kids not knowing how to behave first thing in the morning coming off the bus, and so not only was she dealing with the other stuff and the parents calling in and coming in, but now she had this issue to deal with. And I understood that, but at the same time, you know, I just... That was really the first time I realized she really cannot handle pressure or too much going on, and you know, my team that I went back to, you know, they were like, "What's wrong?" And I told them, and they're like, "You just gotta let it roll off your back, and of course, I did and you know, but it's something that stuck with me. Stuck with me a lot, you know cause, you know, I know sometimes we get overwhelmed and we get fired up...., and this was the good thing about an administrator that was there that I knew very well. I could go in his office, and I could vent. I could go in there and rant and rave. I could say and do whatever I wanted to do, and I knew it stayed right there,

and he let me just cool off and whatever. But at the same time, he could come in my room, and sometimes he would just come in there and sit up on one of the tables or desks, and I would be teaching, and the kids would be like, "'So and so's' in here," and I'd be like, "It's ok." And he'd just be sitting there swinging his leg and I could look at him and tell whether or not he was doing an evaluation or was he doing something. The first time he did that, he told me, "I just had to come in here and cool off. I just needed to go to a neutral zone." He said, "You were in here teaching kids," he said, "so I could just sit and relax and cool down," and so I know we all need that and I know that sometimes we have to go to that place before we say something we shouldn't say. And I know sometimes we say things when we normally would not say it if we're under pressure. And that was just one of those bad times that...it just stuck with me. And she never apologized to me. No, she didn't. She never did. I know she retired about three years later, but she didn't. I don't even think she really realized she did it, but you know, there's a lot of times you could see that she couldn't handle stress.

I think the biggest barrier that we overcome a lot of times is not having as much freedom to make a lot of choices that we feel like we should be able to make. And it's not necessarily our administrative staff's fault; sometimes it's more on the board side. I feel like... I know the board office has a job to do and I know as each stage comes down, there's a job to do all the way down even to the kids and the parents, but I feel like there should be a little bit more control within each subgroup, especially like when we start talking about kids and their schedules and conflicts. One of the biggest barriers that we see and that we don't have a lot of support in is sometimes kids' schedules are changed and we have no reason why. We find out it's a conflict. Well it's not necessarily a conflict between two students that warrants a schedule change. If it's a conflict between the student and a teacher, rather than working the conflict out, they're teaching the kid,

“Ok you can change.” And the parents are given too much control. They can sign a form and say, “Hey, I want my child’s schedule changed,” and then unless there is some reason, 99% of the time, it’s going to be changed. That’s a problem because we’re teaching kids that they can run from their problems that they don’t have to deal with the conflict, deal with the situation. They’re not being taught how to work things out between students, between adults and students, and we...I think that’s a lack of support that we have there within the school. And that’s what I’d like to see more of but you know like I said, the barriers of teaching kids about conflict and not having the support from counselors like we need to have the support for the kids like there needs to be is a big problem. (September 30, 2011)

Analysis of Mrs. Coco’s narrative identifying barriers to middle level teacher-leadership.

Mrs. Coco identified an overwrought administrator who took out her own inadequacies and frustrations on Mrs. Coco because Mrs. Coco attempted to stop a student fight in the middle of an already hectic middle school morning. The administrator seemed to treat Mrs. Coco disrespectfully and belittle her because of her own overwhelmed state. Mrs. Coco made allowances for the facts that it was a stressful morning and the principal was the only administrator on campus that day. However, Mrs. Coco’s voice still carried traces of hurt as she remembered the bad experience and the administrator’s harshly delivered words. “And she just looks at me and she, with a strong tone and a strong face just looks at me and says, ‘I said just leave them here!’... And she never apologized to me. No, she didn’t. She never did” (September 30, 2011).

This administrator’s inability to handle stress caused her to snap at Mrs. Coco. Mrs. Coco was sympathetic to that fact, “And I know sometimes we say things when we normally would

not say it if we're under pressure" (September 30, 2011). However, since the administrator, Mrs. Logan, never apologized to Mrs. Coco, it left her feeling badly hurt and unappreciated for being proactive by stopping the fight and meeting the students' immediate needs. Moreover, those feelings of non-validation and disrespect stuck with Mrs. Coco until that administrator retired three years later.

Another barrier Mrs. Coco identified was a lack of confidence and involvement in making decisions that concerned the students she taught every day. Instead, she believed this perceived lack of trust and autonomy in her ability to make key decisions in her classroom to be detrimental to the students. Mrs. Coco offered, "I think the biggest barrier that we overcome a lot of times is not having as much freedom to make a lot of choices that we feel we should be able to make" (September 30, 2011). Mrs. Coco described how she struggled with just accepting some of the decisions that were made about her students without her input, citing as an example, schedule changes that were made for individual students without the team of teachers' input. According to Mrs. Coco, these changes often resulted in students being placed in classes that were already overcrowded or placing an individual student into a class with another student he or she had a history of conflict with, thus creating a potentially volatile situation.

Mrs. Coco's overall positive and enthusiastic attitude did undergo change as she expressed her concerns over barriers she perceived that hindered her ability to act as a teacher-leader. Table 4.4 summarizes both the supports of and barriers to middle level teacher-leadership as perceived by Mrs. Coco.

Table 4.4

Mrs. Coco's Perceived Supports of and Barriers to Middle Level Teacher-Leadership

Supports	Barriers
Support from district administrators	Disrespectful treatment from site-based administrators
Support from site-based administrators	Lack of autonomy for teachers and teacher-leaders
Support from peers	
Support from students and their families	

Mr. Douglas's Teaching Philosophy

Of all of the participants in this study, Mr. Douglas by far had the most diverse educational background. He was born and educated in South Africa, and it was there that he first taught. After leaving South Africa, Mr. Douglas taught for a few years in England. These varied teaching experiences and the differences in the educational systems played a role in shaping Mr. Douglas's teaching philosophy, which he described in his narrative.

The narrative.

Okay, this is my thirteenth year in education. In terms of school, it'll be my eighth year in middle school. I mainly taught high school both in South Africa and England. In the US, I chose to do middle school. And it's been... But yeah, it's been an interesting transition, quite significantly in the sense that South Africa and England are very similar because we've, you know, England colonized Africa, so we adopted the same education system. The significant difference in terms of subject is we cover less in England but in much more detail, whereas here we cover as much as we can in very little detail a lot of times, and that was something I was very surprised at. And there's a lot of duplication in our system, whereas there was far less duplication in England. A lot more diversity in terms of what is being taught.

Well, in the school as a whole, I've always been in leadership at this school and served on the school leadership committee for the last seven years. In the class as an adult and a teacher, I'm always the leader. So yeah I've been involved in leadership quite extensively both at the subject level as department head and then at another stage I was 'cause I was a Teacher of the Year at one stage...so that meant I had to attend a lot of meetings, and I was a representative for my grade level, [a] representative in the school leadership team, on the school leadership team.

I've been nominated several times by my peers to represent the grade and to be as a subject head as well as when the new principal arrived at our school. She wanted the teachers to decide who their leaders were gonna be as department leaders. They had to vote, and I got chosen several times. But in other areas, I was also appointed by the administration to... for example, we went to the Harvard Leadership Conference. and it was myself and two others that went. We were chosen by the administration to go. Harvard was very selective as to who they chose and we were the only school represented there where everywhere else was the whole system. And there was strict criteria and documentation we had to complete 'cause they were very finite amount of people they allowed at the conference and so as the only school present was really interesting.

As far as who I am as a teacher and a teacher-leader, I could see myself in any of those roles. but I like the innovative stance, not that I've been too successful in that, but in technology, for example, I've experimented with different programs. For example, where many teachers still use PowerPoint as a means, I've used Crazy Creation as another alternative, and the kids seem to like that. I've always made it my goal to teach students something new. Initially, when I first taught, it was...we first moved away from PowerPoint and used Photo Story for quite a while.

I've purposefully moved away from paper projects to digital projects so that I can see the student work and not sit there and grade the parent work. And that's why we do all our projects in school. But the students seem to have enjoyed just the challenge of learning new software, so that side I've always enjoyed. One of the things I remember reading an article about teacher leadership stressed that teachers needed to be masters of the curriculum and the need to maintain your staff in that same sphere. And I find that having taught social studies at one level and now having taught it at another level, that I'm only slowly but sure enough being exposed to this curriculum the second year, I'm starting to feel a little more confident than I think the initial year that I worked on this curriculum. But I see now having gone through this transition, the need for teachers to be masters because your whole approach changes and your own confidence levels change, as well. I guess the teacher in me would say that my room should reflect what students do, and if there is no reflection of what they do, and if students are not successful that I teach, then I cannot be successful. It cannot be a "them and us." We either both fail or we both succeed, and I've always hoped that I end up on the succeeding side, so a lot of my energy and initiatives are geared towards, "What do I do to make sure they are learning?" How do I attract their attention enough to sustain that, especially at this age group?

No person is an island, or no aspect of your life can't be seen as holistic. My faith, my views of how I view the broader society impacts on how I teach. And it impacts on how I treat the students and I expect them to treat me, and so there can't be any dichotomy between any aspect of my life 'cause teaching is a holistic structure. You're teaching a whole student that is developing...that, especially at this age, will make a lot of mistakes, and my role is to guide, and there are times when it's gonna be discipline, as well. But you can't do one more than the other. I often guide myself by the fact that there is someone out there teaching my child, and I always

say that whatever they are doing, I never want them to destroy the confidence of my child. Even if my child is struggling academically, I want them to believe that they can do it. So that's my motivation for how I treat others, so hopefully after a student has been with me, they would have succeeded or felt they can succeed and just go with that desire out of the year of what I've taught them. So that's kind of where I've been for most of my teaching. (November 19, 2011)

Summary of Mr. Douglas's teaching philosophy narrative.

Mr. Douglas approached middle level education with a sense of adventure because it was not his first educator's role, and he had never lived nor taught in the US. He came from a high school teaching background, and he had a different cultural background, as well, having started in South Africa.

Mr. Douglas began his description of his middle level teaching philosophy by focusing on his stewardship. For example, Mr. Douglas was proud to represent his school and his school system in a Harvard University leadership program. He shared, "... I was... appointed by the administration ... Harvard was very selective as to whom they chose, and we were the only [middle] school represented there..." (November 19, 2011). Mr. Douglas expressed in both of his interviews his belief that all teachers should receive professional development and opportunities to develop their leadership skills, and he enthusiastically described his teacher-leadership opportunities.

For Mr. Douglas, being an innovator in his classroom was also part of his teaching philosophy stating: "As far as who I am as a teacher and a teacher-leader, I could see myself in any of those roles but I like the Innovative stance" (November 19, 2011). In that same innovative vane of his philosophy, Mr. Douglas shared a moment of reflection he had experienced after transitioning into a new social studies curriculum, "I see now having gone through this transition,

the need for teachers to be masters because your whole approach changes and your own confidence levels change as well” (November 19, 2011). Consequently, Mr. Douglas found that being an innovator in his middle level classroom meant not only finding new instructional strategies for his students, but also modeling for them by trying new things himself.

Additionally, Mr. Douglas was an advocate for his students, and he believed in advancing their education and increasing the quality of their education at the same time. He declared:

...my faith, my views of how I view the broader society impacts on how I teach. You’re teaching a whole student that is developing..., and my role is to guide...(November 19, 2011).

Mr. Douglas advocated for his students by modeling desired attitudes and behaviors. When students failed to maintain the standards of respect that Mr. Douglas had identified and modeled as acceptable, he would step in and correct the student, always mindful of the fact that students were in his own word, “developing.” Mr. Douglas believed that he could, through example, help students reach their full potential.

Mr. Douglas’s Identification of Supports of Middle Level Teacher-Leadership

The narrative.

I’ve served under two different administrators in this school, and one was very inclusive and was very people-driven and we, for example, sat as a leadership team, and we identified common problems that the school faced, and we all said them. We went back to our constituency and spoke about it, and they gave us ideas, and the next leadership meeting, we sat and solved a lot of issues. We literally did and everyone felt a part of the process. And then we had a transition and the style of the new leadership was much more personally driven, and so it was kind of interesting to see just the difference in the styles, and so I always have fond memories of us all as the leadership team taking ownership of the school-wide problem and then

everybody working towards solving that, and you thought that there was a lot more buy-in from a lot of the staff. Now a particular challenge we faced was being a Title I school and then the year that we did not make AYP and how we sat together. We identified the problem, and everybody chipped in in terms of their contribution to how they are going to solve that, and we met it the following year, and the year after that we met it, as well, but it was really a collective effort, but I think you could have seen that year, there was a great camaraderie and a greater sense of being part of the bigger system. So that's my fond memory, and I think that is essential that you lead with everybody else being part of the solution. (October 1, 2011)

Analysis of Mr. Douglas's narrative identifying supports of middle level teacher-leadership.

Mr. Douglas spoke fondly and confidently about working for and with a site-based administrator who included his leadership team in the decision-making processes for the school. To Mr. Douglas's thinking it is "essential that you lead with everybody else being part of the solution" (October 1, 2011). Mr. Douglas felt as if there was great buy-in when the administrator shared leadership with his teachers and particularly his teacher-leaders.

Mr. Douglas's Identification of Barriers to Middle Level Teacher-Leadership

The narrative.

One barrier I know is funding for supplies. When I mentioned moving away from Power Point to Photo Story instead.... But unfortunately we never had all the equipment to maximize using Photo Story, especially the part where students can narrate and record the narration along with the presentation. We just had very limited equipment, so we couldn't fully maximize that program.

Also, having taught in more than one system, in the US and also abroad, one thing that strikes me about the current system that we are in is that there seems to be a lack of investing significant amounts of money in the development of staff. I mean, I often remember the quote that “Your company is as good as the personnel you develop.” And we are not developing the teachers, and we really can’t expect the great outcomes that we all desire to have, and for me, that is in the current system, something that’s a little more lacking. I also understand the limitation of funds and stuff, but there hasn’t been, from what I have seen, overwhelming push to meeting that goal, as well. I don’t know if that answers your question about barriers but I think ignoring and not prioritizing developing the assets of our staffs is a big barrier to teacher-leadership here. (October 1, 2011)

Analysis of Mr. Douglas’s narrative identifying barriers to middle level teacher-leadership.

Mr. Douglas identified two barriers to enacting his role as a middle level teacher-leader. He also believed these barriers kept the school system from developing teacher-leaders overall. Mr. Douglas perceived these barriers as critical to what he defined should be a priority of all school systems—developing teacher-leaders.

The first barrier he identified was a lack of funding for instructional materials. Mr. Douglas gave an example to illustrate his point, “Unfortunately we never had all the equipment to maximize using Photo Story...we just had very limited equipment...” (October 1, 2011). While Mr. Douglas incorporated as many new programs and forms of technology as possible, a lack of funds for supplies stunted some of his attempts at innovation in his classroom.

The second barrier to Mr. Douglas’s efforts to act as a middle level teacher-leader was what he described as a lack of prioritizing professional development. While he acknowledged

that minimal funds in the budget were partially responsible, Mr. Douglas also described what he perceived as a lack of interest by the school system to offer professional development opportunities to help develop teacher-leaders. Mr. Douglas believed that helping teachers reach their potentials as leaders was not a priority in Winston County Schools and as a result, “We really can’t expect the great outcomes that we all desire” (October 1, 2011). Mr. Douglas did not believe Winston County Schools promoted the development of teacher-leaders at any level, not just the middle level. However, he expressed hope that Winston County Schools might someday change its stance on providing professional development geared towards creating teacher-leaders.

Mr. Douglas only identified one support of his efforts to act as a middle level teacher-leader and he offered only two barriers. Nevertheless, Mr. Douglas expressed strongly developed opinions about both the support and the barriers he identified and these examples are summarized in Table 4.5.

Table 4.5

Mr. Douglas’s Perceived Supports of and Barriers to Middle Level Teacher-Leadership

Supports	Barriers
Site-based administrators who share leadership duties and encourage teacher-leaders to take part in leadership activities and decisions	Lack of funding for supplies
	Lack of prioritizing professional development geared towards training teachers to become leaders

Summarizing the Data Analyses

To summarize what the participants identified as the supports of and barriers to their efforts to act as middle level teacher-leaders, the information is presented in two tables. Table 4.6 displays the supports identified by each participant.

Table 4.6
Supports of Middle Level Teacher-Leadership

Participants:	Supports to Teacher-leadership					
	District and/or site-based administrators' who provide: trust, moral support, shared leadership, recognition of teachers' achievements	Funding for students' instructional needs, Professional development;	Peer support	Autonomy	Student validation of teacher-leadership	Team work among peers & admin.
Mrs. Clayton	X	X		X	X	X
Mr. Milo	X			X		X
Mrs. Blush	X		X			X
Mrs. Coco	X		X	X	X	
Mr. Douglas	X					

It seems to be a positive reflection of the Winston County School system that all five participants indicated they received support from their site-based administrators when attempting to enact their roles as teacher-leaders. It is unfortunate that only Mrs. Clayton had experienced sufficient funding for purchasing instructional supplies and professional development opportunities while enacting her role as a middle level teacher-leader in Winston County Schools. Also unfortunate was the fact that Mrs. Clayton's funding had been provided by a previous principal at Collins Middle School, not by the principal who was at CMS at the time of this study.

Table 4.7 displays the barriers identified by each participant. Some of the same categories identified by participants as supports of their efforts to act as teacher-leaders ended up as categories for barriers to their leadership efforts.

Table 4.7
Barriers to Middle Level Teacher-Leadership

Barriers to Teacher-leadership	Participants				
	Clayton	Milo	Blush	Coco	Douglas
Non-supportive administrators	X			X	
Lack of funds for instructional needs, professional development; or hiring to control the class size cap	X		X		X
Salary/compensation	X				
Lack of autonomy or power	X	X		X	
Lack of time due to scheduling conflicts & paperwork		X			
Disrespect of teachers by school staff or school community of teachers in general and teachers' efforts to lead		X	X	X	X

The information provided by the middle level teacher-leaders in this study identifies barriers that impede their efforts to lead. The participants identified a lack of funding for supplies and professional development, feelings of powerlessness over their classrooms and school's culture, and disrespect for their efforts to improve middle level education as their most commonly perceived barriers.

Chapter Summary

This chapter introduced the five middle level teacher-leaders in this study. First, the participants shared narratives describing their teaching philosophies, each one followed by a summary I provided. Then, the participants' narratives about supports of and barriers to their roles as middle level teacher-leaders were shared, analyzed, and summarized in tables. Finally, all data were presented in two tables that summarized the most commonly identified supports of and barriers to middle level teacher-leadership as perceived by the participants in this study. The next chapter will expound on the implications of these findings, provide a discussion, and describe future topics for research based on the findings in this study.

CHAPTER 5
SUMMARY, DISCUSSION, AND IMPLICATIONS

Introduction

The purpose of this study was to examine middle level teachers' perspectives about the supports of and barriers to their efforts to be teacher-leaders. The guiding research questions were

1. What supports do middle level teacher-leaders identify that facilitate their efforts to act as teacher-leaders?
2. What barriers do middle level teacher-leaders identify that inhibit their efforts to act as teacher-leaders?

Using a qualitative approach that included open-ended interviews guided by narrative inquiry as the methodology, the participants shared their stories of supports and barriers they have encountered while trying to fulfill their roles as both formal and informal middle level teacher-leaders. The data were analyzed using role theory as the theoretical framework, specifically those role negotiations that the participants enacted in their leadership roles as advocates, innovators, and/or stewards (Phelps, 2008).

This chapter includes an overview of the research design, a discussion about the findings with comparisons to previous studies, and implications for further research. The chapter concludes with my final thoughts.

The Research Design

Narrative inquiry was the methodology used to collect the data in this qualitative study. The participants were five middle level teacher-leaders who worked in a middle school in a semi-rural, semi-metropolitan school system in a southeastern state. Each participant took part in two open-ended, in-depth, tape-recorded interviews that allowed them to tell their stories, which detailed what they perceived as the supports of and barriers to their efforts to be middle level teacher-leaders. Additionally, I, as the researcher, kept a field journal and recorded thoughts and impressions during each interview.

For data analysis, I used an “analysis of narrative” technique (Polkinghorne, 1995, p. 16), since the purpose of the study was to understand the participants’ perspectives of their experiences negotiating supports and barriers to their roles as middle level teacher-leaders. Through careful reading, re-reading, identifying of themes, and then extracting threads and examples from their stories, I made sense out of the participants’ sense-making of the data they shared (Kramp, 2004; Polkinghorne, 1995).

The theoretical framework of role theory grounded the analysis of my data. Biddle (1986) wrote that using role theory as a theoretical framework meant remembering that:

...role theory may be said to concern itself with a triad of concepts: patterned and characteristic social behaviors, parts or identities that are assumed by social participants, and scripts or expectations for behavior that are understood by all and adhered to by performers. (p. 68)

This study included not only the participants’ negotiations of their roles as formal teacher-leaders and the cues that they followed as they performed in those roles, but also their informal teacher-

leadership roles as advocates, innovators, and stewards in and out of their classrooms and the supports and barriers they encountered while performing all of their leadership roles (Biddle, 1986; Phelps, 2008).

Discussion

The data analyses in this study revealed findings related to each individual participant and findings that emerged as themes and commonalities among the participants' narratives. The participants' individual narratives revealed their respective identification of supports and barriers to their roles as teacher-leaders. Then, after analysis of all five participants' narratives identifying supports and barriers, I distinguished themes and commonalities among the participants' narratives. The next section describes the themes and commonalities that emerged from the participants' perceptions of supports of and barriers to their middle level teacher-leadership roles. The section closes with a presentation and comparison of this study's findings in relation to previous literature.

Supports of Middle Level Teacher-Leadership

Supportive site-based and district-level administrators.

Most of the participants identified a supportive site-based administrator as one of the most valuable supports of their teacher-leadership roles. Mrs. Clayton, for example, talked about the importance and positive impact a supportive, trust-providing school administrator had on her teacher-leadership and said, "He had the faith and the trust in us to let us do whatever we needed" (September 8, 2011). Another example would be Mrs. Coco's encouraging experience with a district-level administrator who believed in her leadership abilities. Mrs. Coco shared that her administrator believed that, "I would be a good mentor for other special ed. teachers," which was especially impactful for Mrs. Coco given the high status position this administrator held in

the school district (September 30, 2011). In a study published in 2003, Bennett, Wise, Woods, and Harvey reported some examples of ways that both site-based and district-wide school administrators, might support and encourage budding teacher-leaders:

- School leaders must foster a climate of trust and openness as a basis of interpersonal relationships among leadership teams.
- School leaders must recognize expertise rather than formal positions as the basis of leadership roles within their schools' groups. (p. 6)

Mrs. Clayton found inspiration to try new, innovative means of advocacy for her eighth graders when her school's principal and the instructional coach, as evidence of their trust in her, empowered her by allowing her to try new instructional approaches and supporting her endeavors to take educational experiences outside the confines of the classroom. Mrs. Coco experienced validation and pride when the school system's district-wide Special Education Director selected her as a mentor for new ESE teachers throughout the county.

Additionally, Carr's 1997 study revealed, "Administrators can do much to nurture that new perception of teacher-leadership, by exemplifying transformative leadership" (p. 243). For example, when school leaders provide their approval for teacher-leaders' ideas and innovations, they provide supportive examples of true leadership. By being willing to take risks on behalf of the ideas of their staff members, these school leaders transform their schools into places where teachers become eager to assume teacher-leadership roles. The participants in this study all put great importance on the support and trust they received from their administrators.

Providing funding is one way in which administrators demonstrate their support. During the course of this study, all of the participants shared stories at some point about experiences with funding and how that facilitated or hindered their efforts to lead in their classrooms, their

school, and their profession. Mrs. Clayton shared how important it was to her role as an innovator and steward to have funds to purchase supplies for her students and funds for professional development opportunities for her. Her former principal “paid for me to do a lot of...speaking at conferences, attending different trainings, and bring[ing] that [information] back to share with our staff” (September 8, 2011). Mrs. Clayton was also able to “take the kids, with monies he found us, out into their community to do service projects and be leaders in their community.” As a result, “People saw them taking leadership roles and it’s because my principal let me take that leadership role in the community and supported us with funds (September 8, 2011).

In a study published in 2005, Halverson wrote that school leaders should build opportunities for teachers to interact with common goals that benefit the learning community of their schools, as well as furthering their own professional growth. Then, if school administrators provide teachers with both the resources and support needed to act upon the teachers’ conclusions reached within their professional learning communities, the ultimate results are successful, improved schools. This underscores Mrs. Clayton’s experiences because with financial support from her administration, she attended conferences that enhanced her pedagogy and allowed her to bring back that new learning and share within her school.

Supportive peers.

As they enact their roles as teacher-leaders, many teachers find that the best support system available to them are the other teachers in their school. Mrs. Blush addressed that very wish in one of her narratives when she described how encouraged she felt in her role as a leader because of support she received from her peers. “Well I definitely feel supported, not only from my peers... in the grade level but also from the administration ... and it makes a big difference”

(September 29, 2011). Mrs. Coco echoed this response, sharing that she too was inspired to lead when other teachers cheered her efforts, “A lot of it I know is the bridges that I’m building with the teachers around me, not just my team and not just the teachers that I share a subject area with but with others ...” (September 30, 2011).

In 2001, Barth wrote that teachers, “hold the power to unlock one another’s leadership potential” and promote the development of their peers’ voices (p. 446). In middle level education, where teachers are often members of interdisciplinary teams that work and plan together, it is particularly important to build strong collegial relationships and support groups among one’s peers (Jackson & Davis, 2000; Petzko, 2004).

Furthermore, de Lima (2008) noted the importance of educational networks for creating “professional ties to other colleagues” who regard “them as particularly influential in promoting their professional development” (p. 167). Teachers are more likely to embrace leadership opportunities, which include being supportive of their fellow teachers, when they have received their peers’ support, making it a win-win scenario for everyone. Both Barth and de Lima’s studies had similar findings regarding the positive benefits of peer support to teacher-leaders (Barth, 2001; de Lima, 2008).

Autonomy.

In this study, three of the five participants discussed how a sense of professional autonomy, or the sense of being trusted to make good decisions in their classroom or their other professional roles, contributed significantly to their feelings of success as teacher-leaders. Mrs. Coco, for example, described the confidence she gained from having her expertise and autonomy welcomed in and outside the classroom. She said, “It felt really good to be given the chance to suggest ideas, to be able to go with things and not be taken for granted” (September 30, 2011).

Mr. Milo had similar positive feelings about experiences as a leader whenever he felt he had autonomy in making decisions. Mr. Milo discussed the importance of teachers being responsible for their own professional goals: “[I]f you want [teachers’] buy-in, then they have to make the decisions about how ... to achieve their goals” (September 15, 2011).

Frost and Durrant (2002) supported Mrs. Clayton’s and Mr. Milo’s estimations of the importance of autonomy in decision-making for teacher-leaders: “The more individual teachers are able to exercise leadership and professional judgment, the more the school develops the conditions which favor change and improvement” (p. 155). Additionally, Petzko (2004) urged schools to give middle level teachers more autonomy in their classrooms and within the school because their experiences reflect an understanding for, “issues of power, authority, and influence,” and they use that understanding to improve educational experiences in their classrooms and schools (p. 83). When teachers receive decision-making opportunities to advocate, innovate, and steward young adolescents, the entire school culture may reap the benefits.

This section summarized the findings regarding the supports that were perceived by this study’s participants as facilitating their efforts to act as middle level teacher-leaders. The next section reveals the findings regarding barriers to middle level teacher-leadership. These findings are discussed and situated within the context of the pre-existing literature.

Barriers to Middle Level Teacher-leadership

Non-supportive site-based and district-level administrators.

Ironically, Mrs. Clayton, who spoke so highly of a supportive administrator she had previously worked for at Collins Middle School (CMS), had a lot to say about the barriers a non-supportive administrator can present to a middle level teacher’s efforts to lead. She expressed her

frustration saying, “I think one of the worst barriers is perhaps not having the trust of your administration”(September 8, 2011). Mrs. Clayton also spoke of feeling frustrated when her site-based administrators did not include teachers or teacher-leaders in the planning stages of goals for the school. She was equally upset when her administrators did not share the reasoning behind school wide decisions, stating, “...we need to know why we’re doing what they want us to do... we’re the ones getting thrown under the bus. That fear can definitely be a barrier” (September 8, 2011). Mrs. Clayton’s statement about the “fear” of “getting thrown under the bus” is a picture-evoking metaphor that explains why administrators who dictate policy without seeking input from their faculties risk alienating their teachers and discouraging teachers from ever realizing their leadership potential.

Mrs. Coco also gave a detailed account of how an overwhelmed administrator negatively affected Mrs. Coco’s leadership potential when the administrator used an abrasive tone with her during a student disciplinary issue. “[S]he never apologized to me. No, she didn’t. She never did” (September 30, 2011). During the three years between the incident and this administrator’s retirement, Mrs. Coco did not take any leadership roles outside of her classroom, even leadership positions she was nominated for by her peers. With harsh words and an apparent refusal to make it right, this administrator thoughtlessly undermined a strong and dedicated teacher’s initiative to hold positions and do work that most likely would have benefited the school as a whole.

Barth (2001) argued that only principals who are secure about their abilities to lead choose to facilitate teacher-leaders. He stated they do this by supporting teachers in the following ways:

- By trusting teachers enough to allow them chances at leadership tasks
- By empowering teacher-leaders to share their voices in a welcoming format

- By protecting teacher-leaders from “naysayers” within their teaching community
- By recognizing publicly the efforts of teachers who take the risk of sharing their teacher’s voice
- By giving abundant praise for successes. (Barth, 2001, p. 448)

Barth’s prescriptions in this list include the desired supports identified by Mrs. Clayton and Mrs. Coco in their narratives. Barth also encouraged us to treat teachers who are attempting to lead with respect because when teachers feel their voices matter and they have part of the ownership in decision-making, their morale is greater and they are less likely to leave the profession early.

Additionally, Carr (1997) and Zepeda, Mayers, Stewart, and Benson (2003) described the importance and influence administrators at both the school and district levels can wield over the development of their teacher-leaders. When administrators offer anything less than their encouragement and support to budding and active teacher-leaders, it can be damaging to their schools’ culture.

Lack of funding.

When teachers who endeavor to lead at the middle level face a lack of funding for their instructional needs or professional development opportunities, they find it difficult to continue pursuing their desired leadership roles. Mrs. Blush addressed this issue in one of her narratives about barriers she faced, stating that, “[We] come up with these wonderful ideas, but money and budget [are] often an issue....There are things that these kids need, but there’s...no money” (September 29, 2011). According to Mrs. Blush, she and her peer teachers have had ideas in the past that would bring better instruction to their students and even gained their administrators’ support for their ideas, but when they asked for the funds from the school system, the money was

not available. For example, Mrs. Blush stated, "...education is just not important the way other things can be," and she expressed frustration about not having enough time, resources, or support to do what she would like to do with her students.

Mr. Douglas shared his disappointment about the fact that Winston County Schools did not provide enough funds for professional development that could lead to developing more and better teacher-leaders. In his case, Mr. Douglas expressed concerns both for the lack of funding due to limited money available, but he also indicated that he believed funds were not earmarked and budgeted for professional development topics that might facilitate teacher-leaders. "I think ignoring, and not prioritizing, developing the assets of our staffs is a big barrier to teacher-leadership here" (October 1, 2011). Mr. Douglas expressed frustration because he believed the funds that were available were not being prioritized correctly when it came to professional staff development and particularly not when it came to offering staff development that would facilitate the creation of teacher-leaders.

Research supports Mrs. Blush and Mr. Douglas's claims that funding is vital for teachers to develop into leaders. Smit, Fritz, and Mabalane (2010) found when talking to a male teacher who desired more professional development and funding for classroom supplies: "What is it that he is modeling to the learners, considering the lack of resources and uncertainty about his content knowledge, which often make him anxious and insecure" (p. 103). Conversely, they studied a teacher working in an impoverished community who was supported with some funding and developed her teacher-leadership role to its potential. "She utilizes the resources at her disposal optimally and as such...is...empowered" (Smit, Fritz, & Mabalane, 2010, p. 103).

Although it can be difficult in today's economy to find funding for classroom supplies and professional development, teachers appreciate the opportunity to provide input as to how the available funds will be spent. Teachers who lead need to have a voice and be treated as the professional, knowledgeable stakeholders that they are.

Salary and compensation.

Going hand-in-hand with funding for instruction and professional development, salary and compensation weighed heavily on some of the participants' minds. They expressed reluctance to venture too far down the leadership road while still experiencing furlough days and other forms of threat to their personal livelihoods. They were candid when they shared that being a teacher-leader takes time for which they are not compensated and sometimes requires money out of their own pockets. Since they did not feel they had enough of either time or money, they admitted that they hesitated to take on more responsibility. In this study, Mrs. Clayton had a lot to say about taking on more responsibility as a teacher-leader and what it means to her as far as her salary, compensation, unpaid time, and self-worth. She said:

This is the only profession where people get taken advantage of. You tell a doctor to work for less pay and see if he's gonna do it. Or a lawyer, or anybody else. But people know ... I would still do my job ... And so they take advantage of us, financially, and that makes it harder to be a teacher-leader. (September 8, 2011)

Mrs. Clayton expressed an idea that was echoed by other participants in this study when she discussed what she saw as the ways society seems to take advantage of teachers. Mrs. Clayton stated that many teachers would often use their personal financial resources to compensate for a school system's budgetary deficit because these teachers want to do the best job possible for the children they teach. Worse, she stated that she believed society is aware of these teachers'

willingness to use their own money and therefore allows teachers to make these sacrifices, instead of finding or prioritizing money in schools' budgets to pay for resources and supplies.

Lack of autonomy or power.

Some of the participants in this study described a lack of autonomy or power as a barrier to their roles as teacher-leaders. For example, Mr. Milo shared a narrative about a former administrator who saw Mr. Milo's questions during faculty meetings as threatening, instead of a sincere lack of knowledge, on Mr. Milo's part, about school procedures. As a result, Mr. Milo received an "NI" or "Needs Improvement" overall rating in his final evaluation of the year, even though he had received ratings of excellence on his classroom observations and evaluations throughout the year. Mr. Milo was upset by what he considered being blindsided with an unexpected below-par rating and shared the conversation he had with the administrator he felt had rated him unjustly.

I said, "How would you have felt at the end of your first year if your administrator had done that to you?" And he said, "I would have felt the same way you did." And he knew he was wrong to have done it that way. Was he right about me challenging him? In his eyes, yes. Was I trying to challenge him? No. Did it come across that way? Probably.

(September 15, 2011)

Mr. Milo was demoralized by the fact that this principal had placed a "Needs Improvement" score on this end of the year evaluation without giving him the opportunity to change the way he asked questions during meetings. Mr. Milo felt stripped of his autonomy to the point that he now feared asking questions when there was a policy or procedure he did not understand. The

administrator admitted that he had been wrong to handle the evaluation that way, gaining Mr. Milo's respect to some degree. However, Mr. Milo thought long and hard about contributing to his middle school as a teacher-leader for some time after the incident.

Mrs. Coco also shared a sense of powerlessness that was a barrier to her teacher-leadership roles at times and said, "I think the biggest barrier that we overcome a lot of times is not having as much freedom to make a lot of choices that we feel...we should be able to make" (September 30, 2011).

Research that supports the importance of providing teacher-leaders with autonomy discusses the positive improvements these teachers can make in the schools in which they lead. For example, Kirk and MacDonald's (2001) study indicated that teachers, who had participated in rewriting and creating new curriculum and then taught the curriculum they had co-authored, provided an authenticity that no other participant could have brought. Student achievement increased and the school system involved benefited for years afterwards.

Petzko (2004) stated that providing teacher-leaders with autonomy and decision-making is critical to avoiding unnecessary attrition. "The involvement of teachers in the decision-making process is critical to schools of the 21st century. Recent research states that schools where teachers are given greater voice in making decisions that affect their jobs have significantly less turnover" (p. 83). School administrators, both site-based and district-wide, can encourage the best teachers to stay in their schools by trusting them to make significant decisions regarding school improvement.

Additionally, teachers must feel safe to speak out on issues that they believe will better their schools. Frost (2008) related information about a teacher he worked with who felt she could make suggestions and be autonomous in contributing to leadership decisions in her school and

classroom because she did not fear losing her job or position within her school. In her school, Frost (2008) found, “She talked about the prevailing culture of trust and respect where risk taking was encouraged but no blame attached if things did not go well, ‘chatting about teaching and learning, it is nothing official it is just part of the conversation at school’” (p. 343).

Lack of time for leadership activities.

Not having the time to act as a teacher-leader and try out ideas caused one of the participants in this study to express regrets. Mr. Milo shared that he felt like his efforts to act as a leader in his middle school were often undermined by scheduling conflicts. For example, he was designated the Science Department Chairperson while at the same time being assigned several after-school duties that made scheduling regular meetings and time to collaborate all but impossible. Additionally, Mr. Milo expressed frustration over what he described as a plethora of paperwork—much of which was unnecessary to his thinking: “I feel like we drown in paperwork ... Is it a detriment to us being able to do the things that you might want to do as a leader? Yes” (September 15, 2011).

Research supports Mr. Milo’s reservations about being able to fulfill his teacher-leadership roles. Phelps (2008) cited, “The constraints of limited time and heavy responsibilities” as “obvious impediments” to teachers taking leadership roles in their schools (p. 122). To Mr. Milo it was disrespectful to expect teachers to take up the mantle of leadership and then impede their progress with time constraints and laborious tasks.

Lack of respect for the teaching profession.

All of the participants touched on the idea that they perceived the teaching profession to be a target of disrespect by various people and groups. For example, Mrs. Clayton, Mrs. Blush, and Mrs. Coco all felt that their efforts to lead were sometimes not respected by students and

parents in their school community. Mr. Milo said that he did not think it was respectful of his site-based nor district administrators to expect him to be a teacher-leader, while also constantly presenting him with scheduling and paperwork duties that conflicted with his leadership responsibilities. Mr. Douglas expressed what he identified as a disrespectful treatment of teachers in Winston County Schools by the school system's lack of professional development opportunities that supported and developed teacher-leaders.

The literature about teacher-leadership also contains discussions about the importance of respectful support being provided for teacher-leaders. Frost (2008) identified a participant who described the effect that a "prevailing culture of trust and respect, where risk-taking was encouraged but no blame attached if things did not go well" (p. 343) had on collegial collaboration at her school. In that school, professional discussions were the norm. "[C]hatting about teaching and learning...is just part of the conversation at school" (p. 343). In this case the young woman in Frost's study enjoyed a security and respect provided by her peers, administrators, and community that encouraged her to develop her teacher-leadership skills. Barth (2001) also discussed the importance of respecting teacher-leaders within a school's community because teacher-leaders have an influence on improving student achievement and contributing toward other meaningful changes within their schools. Phelps (2008) described the importance of peer support and respect to the success of teacher-leaders and cited what she dubbed as the "Jack and Jill effect," which explained the damage non-supportive teaching colleagues can do to the efforts of teachers trying to act as leaders in their schools (p. 122).

Implications

The implications of this study, which examined the perspectives of five middle level educators, suggest ideas for further research and potential ways that school systems might successfully develop middle level teacher-leaders.

During the data collection portions of this study, it became apparent that the five participants cared a great deal about both middle level education and teacher-leadership. None of the teacher-leaders who participated in this study indicated that they regretted taking on leadership roles either inside or outside of their classrooms. However, all five of the participants did share barriers they perceived as inhibiting their efforts to lead more and to do more for their students and their school.

Implications for Further Research

First, this study was conducted with five participants all of whom taught in the same middle school in a semi-rural, semi-metropolitan school system in a southeastern state. It would be prudent to consider the data collected in this study as a starting point from which larger populations in a variety of middle school settings might be asked to share their perspectives about the supports of and barriers to their efforts to act as teacher-leaders.

Additionally, one of the participants in this study came from a background in leadership that started somewhere other than education. Future studies that seek to gather the perspectives of educators who come from non-educational leadership backgrounds may contribute further to the identification of supports of and barriers to middle level teacher-leadership. For example, one research question of such a study might read: *Do leadership experiences that occurred outside of middle level education help or hinder a middle level teacher in negotiating his/her teacher-leadership roles?*

Finally, the findings in this study suggest it may be timely and beneficial to middle level education to conduct a study that examines middle level principals' perceptions of the supports of and barriers to their efforts to facilitate the creation of middle level teacher-leaders in their schools. Site-based administrators were named by the teachers participating in this study as a means of both supports of and barriers to their efforts to act as middle level teacher-leaders. Therefore, it is possible that understanding middle level administrators' perspectives would both inform and improve the fields of middle level education and teacher-leadership.

Implications for School Systems

This study shed light on the fact that while these middle level educators were cognizant of the fiscal limitations their school system battles, they would be willing to attempt more teacher-leadership work if they had more input into how these limited funds were used to support their classroom instruction and their professional development. It was also apparent that the teachers appreciated when their efforts to be leaders in their school and community were positively supported and encouraged by their school district.

Implications for Site-based and District Administrators

The participating middle level teacher-leaders in this study provided several examples of how they felt empowered to lead when given certain supports from their school administrators. Among the supports they validated as meaningful were signs of trust/faith, morale-boosting "Atta boys," autonomy, shared leadership opportunities, and funding for teacher-leaders' professional development. The flipside implications that were revealed for middle level site-based and district administrators entailed avoiding the practice of dictating school policy without inviting or considering teachers' voices. Instead, administrators should solicit input from

teacher-leaders and potential teacher-leaders. Additionally, site-based administrators who acknowledge teachers' classroom accomplishments can both develop and encourage teacher-leaders.

Implications for Middle Level Teachers

Finally, this study provided implications that may apply to all middle level teachers. Teachers can help themselves and other middle level teachers if they support one another's efforts to lead. Being a positive cheerleader for one's peers not only helps those teachers to achieve leadership status but also develops and strengthens leadership potential in the one who is cheering. In addition to offering one another praise, teachers can support their schools' teacher-leaders by offering time and assistance to accomplish tasks, providing moral support, and volunteering to try suggested classroom techniques willingly. Teachers learn well from other teachers and can develop skills by observing, experiencing, and appreciating mentoring from a teacher-leader.

Concluding Thoughts

I have been a teacher for more than half of my life, and I have spent all of that time in middle level education. In my first year of teaching, I had the opportunity to be a teacher-leader through sponsoring student clubs and activities, and I was a teacher-leader in some capacity for the rest of my middle level teaching years. I have held many leadership positions including, for example, being a system-wide in-service facilitator, a department chairperson, a School Improvement Plan chairperson, a team leader, a Principal's Advisory Committee chairperson, a teacher's union steward, and a faculty chairperson. What I have learned is that every child I teach offers at least one surprise I have never experienced before, and every teacher I am teamed with has something amazing to teach me.

Teaching young adolescents is not for the faint of heart or character. I was impressed with how dedicated the participants in my study were. They all described very tangible barriers to their efforts to negotiate their roles as teacher-leaders, but not even one of the five indicated they would choose a different path. They all talked about their love for their students and their love for their leadership roles. All five of them were surprised when I asked them if the barriers they faced ever made them feel like quitting—teaching, leading—any of it. They reacted with astonishment and more than one reacted with humor, as if I had suggested something so ludicrous it could only be a joke. Quit? Teaching, advocating, innovating, stewarding? Who would teach my children if not I? Who would lead my classroom, my grade level, my department if not I? Who, indeed?

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APPENDIX A

INITIAL INTERVIEW GUIDE

The following questions will act as guide to the interview. I will attempt to ask all of the primary questions (identified with numbers) as possible and I have included sub-questions to prompt deeper reflection from participants. However, deviation from this guide may be necessary dependent on participants' responses.

1. Tell me about your background as a middle level educator. Please include as much detail as possible.
2. Describe your ideal day as a middle level teacher.
3. Tell me about a time that you felt like a leader in your school.
4. Describe a time that someone else identified you as a leader in your school. Who identified you as a leader and why? How did it work out?
5. Patricia Phelps, a researcher in the field of teachers' roles, describes three possible titles that teacher-leaders can use to describe themselves. There is an "innovator," someone who is not afraid to pioneer new instructional strategies and share the results with others, to improve student learning, an "advocate," someone who "frames and reframes issues so that students and learning remain the central focus" or as a "steward," someone who works to improve the status of teaching (Phelps, 2008, pp. 120 – 122)? Do one or more of these titles describe how you see yourself and if so which ones? Share a story that illustrates your point.
6. Think of one memory you have about your experience as a teacher-leader (positive or

negative) and tell me about it.

- Why did you choose this event to share?
 - What, if anything, would you change about your role in this event? Why?
 - What would you change about other people's role(s) in this event? Why?
 - If there was one thing you would say about this event it would be...
7. In your efforts to be a teacher-leader how are you supported? Discuss who and/or what provides support to you as a teacher-leader.
 8. What are the barriers to your efforts to be a teacher-leader? Discuss who and/or what provides barriers to you as a teacher-leader.
 9. If you were putting together a scrapbook about your experiences as a middle-grades teacher-leader what kind of artifacts (tangible items) would you include? What things have made a difference in your experiences as a teacher-leader?
 10. One last question: Do you believe being a teacher-leader affects other roles you have in your life, such as parent, friend, spouse, etc., and if so, how?

APPENDIX B

SECOND INTERVIEW PROTOCOL

The following questions will act as a guide to the interview. However, deviation from this guide may be necessary dependent on participants' responses.

1. Describe your teaching philosophy.
2. I define “teacher-leaders” as people who choose to lead in their teaching lives. Teacher-leaders may act as *advocates*, improving learning conditions in their classrooms and for students school-wide. Teacher-leaders may act as *innovators*, learning and trying new instructional and technological methods to enhance their practice as teachers. Teacher-leaders may act as *stewards*, working to improve teaching conditions and the practice of teaching as a whole. Teacher-leaders may act in any of the above roles, a pair, or even all three roles at any given time. From your perspective and experience either acting in these roles or witnessing others successfully take on one or more of these leadership roles, provide examples of how a teacher-leader can
 - Advocate for positive change in his/her classroom
 - Innovate/find new ways to enhance instructional strategies
 - Steward/work to improve teachers' working conditions
3. Finally, what are your personal “non-negotiables” that either must be present or must be absent before you will take on a teacher-leadership role? Why are these conditions “non-negotiable” to you?

APPENDIX C

INITIAL CONTACT WITH PARTICIPANTS

(Sent via Electronic Mail)

Dear Middle School Teacher,

I hope your school year is off to a great start. Currently, I am in the process of recruiting teachers to participate in a study entitled “Middle Level Teacher-Leaders' Stories about Supports of and Barriers to their Leadership Experiences.” As noted in the title, this qualitative study will focus on your experiences as a middle level teacher-leader. Using a research method known as narrative inquiry, I will interview you, privately, and ask you to share your narratives (stories) about your experiences as a middle level teacher-leader. If you choose to participate in the study, you will attend an introductory informational meeting that will provide you with details about the study and give you an opportunity to ask questions. This meeting will last approximately 45 minutes. Your individual participation in the study will consist of two, one-hour audio-recorded interviews, during which you will share your teacher-leadership stories.

If you would like to learn more about the study, then please feel free to e-mail me at bevb717@hotmail.com or call me at 770-207-5823. Thank you for your time.

Sincerely,

Beverly Burchfield

University of Georgia

Doctoral Candidate—Middle School Education

APPENDIX D

PARTICIPANT CONSENT FORM

I, _____, agree to participate in a research study titled “Middle Level Teacher-Leaders’ Stories about Supports of and Barriers to their Leadership Experiences” conducted by Beverly Burchfield from the Department of Elementary and Social Studies Education at the University of Georgia (706-542-4244) under the direction of Dr. P. Gayle Andrews, Department of Elementary and Social Studies Education, University of Georgia (706-542-4244, gandrews@uga.edu).

I understand that my participation is voluntary. I can refuse to participate or stop taking part at any time without giving any reason, and without penalty or loss of benefits to which I am otherwise entitled. I can ask to have all of the information about me returned to me, removed from the research records, or destroyed.

The reason for this study is to examine middle level teachers’ perspectives regarding supports of and barriers to their efforts to be teacher-leaders. If I decide to take part, I may be asked to participate in these activities:

- One 45-minute informational meeting describing the study’s purpose and allowing me to ask questions regarding my participation in the study.
- Two one-hour semi-structured individual interviews, one at the beginning of the study and one at the end, discussing my experiences and opinions about supports and barriers to my experiences as a middle level teacher-leader (audio taped and transcribed).

Risk from participating in the study is less than minimal and consists of possible discomfort discussing personal beliefs about supports and barriers to my efforts to be a teacher-leader. I understand that I can skip questions that make me feel uncomfortable and that audio-recordings of the interviews will not be publicly disseminated. I understand that I may stop participating at any time I wish to do so. Benefits from participating in the study may include beneficial changes in my experiences as a middle level teacher-leader, and findings from this study may help encourage and create more opportunities for middle level teachers to become leaders.

I understand that the researcher is asking for my permission to use my information for research and possible publication. Any individually identifiable information I provide will be kept confidential. My real name will not be used in any reports, and the information from my participation will not be reported in any individually identifiable form. All contact information and data that include identifiable information will be stored in a locked cabinet and destroyed after the dissertation is written.

The researcher will answer any questions I have about the study now or during the project. I understand the project described above. My signature indicates that I agree to participate in this project. I understand that I may stop participating at any time if I wish to do so. I have received a copy of this form to keep.

Name of the Participant	Signature	Date
Beverly Burchfield, Researcher Telephone: 770-207-5823 Email: bevb717@uga.edu	Signature	Date

Please sign both copies, keep one and return one to the researcher

Additional questions or problems regarding your rights as a research participant should be addressed to The IRB Chairperson, Institutional Review Board, University of Georgia, 612 Boyd Graduate Studies Research Center, Athens, Georgia 30602-7411; Telephone (706) 542-3199; E-Mail Address IRB@uga.edu