

An emerging view of teacher leaders working within teacher unions: Can networks build understanding and capacity?

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Introduction

This paper describes a collaboration that stretches around the world and which has come about for three key reasons. Firstly, the authors have accepted the challenge laid down by Nina Bascia at last year's AERA Conference in Chicago, in which she called for greater collaborative work and research amongst the members of the AERA's Teacher Unions/Teachers' Work Special Interest Group (SIG). Secondly, all four authors were involved in giving papers at Chicago in the same session (Alexandrou and O'Brien, 2007, Naylor, 2007, Williamson, Garsed, and Gardner, 2007) and it soon became apparent to them that although they were tackling three distinct issues, a clear theme was emerging, in that the role of the teacher trade union activist could and should encompass various aspects of leadership in ways which link to a wide body of literature in both the management and educational fields. Thirdly, the issue of teacher leadership at all levels within schools is now being talked about by key policy stakeholders in Australia, Canada, and Scotland. For example, in Scotland, Her Majesty's Inspectorate of Education (2007) has recently produced a key report entitled *Leadership for Learning: The Challenges of Leading in a Time of Change*. In the foreword to the report, Graham Donaldson, who is Her Majesty's Senior Chief Inspector, states that:

One of the main challenges facing Scottish education is to build on existing strength to create an excellent educational experience and successful outcomes for learners of all ages. Achieving that goal will require leadership of the highest quality throughout our education system. (2007: iv)

Thus, since the end of the 2007 AERA conference, the authors have been involved in putting together a project about the leadership attributes of teacher trade union activists in Australia, Canada, and Scotland. Due to significant geographical distances and time zone differences, this has proved an interesting and exciting exercise in global academic collaboration. It has led the authors to be innovative in the manner in which they communicate with each other, the participants involved in this initial phase of the research, and the technology used. The next section will briefly outline the research approach and technology used for this project and for putting this paper together. The research is in its early stages and this paper will report on our initial findings and where we want to take this project in the next few years.

This project is exploratory, examining the concept of teacher leadership and an approach to networking SIG members with a common research interest in three countries. While we can offer limited conclusions at this stage, we intend to promote a lively discussion on:

- What is teacher leadership and how can it be developed and encouraged in teacher unions?
- What qualities, skills and approaches are demonstrated by teacher leaders who are active in the professional focus of teacher unions?
- Is international networking linking practitioners and researchers via audio conferencing an approach that might benefit both teacher leaders and teacher unions?

Importance of the study

K–12 public school teachers have limited opportunities to engage in reflections on practice. This project offers one union-led approach to engage them in “user-friendly” approaches to discourse and reflection. Using web-based audio conferencing offers a method of collecting data from multiple sources with minimal time allocation required by teachers, yet also offers teachers a way to connect with other teacher-leaders and to compare approaches and skills in very different contexts. By including those critical friends who engage with teacher leaders, the project builds critical friend networking and discourse. The project also aims to build teacher union networking and teacher unions’ capacity to develop teacher leaders.

Research approach/technology

This research is underpinned by the Democratic Evaluation approach to educational research, where the voice of the participant is primary (Alexandrou, 2007; House, 1993; Kushner and Norris, 2007; Stake, 2005). The authors have adopted a mixed-methods approach as advocated by Phillips (2004), and by the very nature of the subject being analyzed, the research in the main has lent itself to a qualitative approach in data collection with some quantitative analysis to be carried out as the project and the research progresses. As stated, a number of different methods have been used to gather and disseminate data. Firstly, background information was collected from key policy documents. Secondly, the literature pertaining to school leadership was examined to draw out certain themes that would help to initiate a discourse with the teacher trade union lay activists. The literature helped the authors devise a set of questions which were put to the participants in the first instance verbally, and then the participants were then asked to reflect on the questions and write a short personal record based around some of the issues raised in the initial discussions and ones that were pertinent to themselves.

The research team has used “E-Illuminate” software. This web-based conferencing system enables participants to engage by audio connection, thus holding conversations about teacher leadership. The BCTF in Vancouver, Canada, hosts the sessions, as they have purchased the E-Illuminate software, but any current or future participant can join the discussion simply by accessing the URL provided by the BCTF. Thus, should the project expand to include more teachers and more countries, the same software can be used without any additional charges to current or future participants. In addition to audio connections, the software includes signals for when a participant wishes to speak, a text messaging screen, and a screen to import PowerPoint slides and presentations. The sessions are recorded and are accessible to all participants through a separate URL within an hour of the end of a conversation.

In addition to using the E-Illuminate software, the authors decided that to enable all three of them to work on constructing this paper based on one master copy, that further technology would be used in the form of a Wiki. The Wiki was set up by Charlie Naylor with a password for all the authors to use. The advantage of the Wiki is that there was one copy of the paper that can be accessed readily and the authors could add to or change aspects of it as new evidence came to light. Using the Wiki not only saved time, it stopped multiple copies of the paper being sent by e-mail, and thus avoided duplication of effort and possible confusion. The authors would strongly recommend this approach for colleagues who are involved in multi-national projects; putting together conference papers, journal articles, and evaluations.

In order to facilitate reflection and discussion, the following questions were circulated to the teacher participants prior to the discussions:

- Tell us about your work in the union—projects, committees, associations, etc.
- How do you view leadership in general?
- What in your work do you consider shows leadership? Discuss some notions of leadership that this reflects—e.g., facilitation, encouragement.
- Why do you do this work, and why in the union?

The participating teachers were also offered a series of quotes taken from our literature review, and asked to link the following questions both to their own experience but also to the literature as reflected in the quotes.

- What do you see as making teacher leadership successful?
- Who has encouraged you to be a leader? In what ways have they done this?
- In what ways might school principals encourage leadership?
- What is it you are most passionate about?
- What have been some of your key successes and challenges?

Literature review

Randi and Zeichner (2004), in discussing teacher networks, suggested that they generally incorporate facilitative leadership and collaborative learning approaches, with respect for both context-specific and generalized knowledge. There is a growing discussion about new forms of leadership, in particular distributed leadership (Rhodes et al., 2001). Linden (2002, 2003) explores the notion of collaborative leadership that he argues is becoming more relevant in work environments with flattened hierarchies and increased use of information technology. He offers ideas for collaborative leaders that build relationships and capacity while avoiding individual credit. His concept is the capacity and growth of the group rather than that of the individual. But he also articulates four key qualities of effective collaborative leaders:

- ...tremendous persistence and energy and resolve with limited egos;
- passion about the outcome which attracts others, but “because the passion is about the outcome and not about their resume, they tend to build trust and goodwill”;
- ability to pull (encourage, invite) rather than push (order or pressure), in part because they have no formal hierarchical authority;
- capacity to think systemically, understanding interconnections in complex systems and how other organizations work.

The OECD’s *Schooling for Tomorrow* reports (2004, 2003, 2001) consider a wide range of networking options as holding great promise to promote collaboration and teacher professional development, which they claim appears consistent across provincial and national boundaries. In one OECD publication, Van Aalst (2003) describes four advantages in networks:

- ...networks open access to a variety of sources of information;
- they offer a broader range of learning opportunities than in hierarchical organizations;
- they promise a more flexible while more stable base for co-ordinated learning than does the anonymity of the market; and
- they help to create and access tacit knowledge. (p35)

But there also exists clear evidence of fragility in many networks (Parise and Sasson, 2002; Koza and Lewin, 2000). Impermanence of networks should not be confused with failure—networks are rarely permanent, more often established for a specific purpose, and should therefore fold and reform as different priorities emerge. Knowing when to end a network or a collaboration, therefore, appears equally important as knowing when to start or to continue it.

The utility of the OECD's view and examination of networking is that it places the concept within various futuristic contexts. Its weakness is that it fails to link to an existing literature on teacher networks, perhaps best explored by Lieberman and Grolnick (1997), who concluded:

Our look across networks helps us to understand their strong contextual nature, their infinite variety of purpose and character, and their similar organizational tensions. Regardless of their individual differences, they appear to have in common the ways in which they bring people together and organize their work: agendas that are more often challenging than prescriptive; learning that is more indirect than direct; formats for work more collaborative than individualistic; attempts at change more integrated than fragmented; approaches to leadership more facilitative than directive. (p213)

There appears to be a greater sense of collegial, practitioner-controlled sharing implied in Lieberman and Grolnick's work than in much of the OECD literature, which implies a greater managerial control of networks. Thus there may be significant differences in networks depending on the locus of control, in particular where the control is managerial or in the hands of practitioners, and whether control is explicit or implicit. Making the implicit explicit might be a basis for clarifying the form and nature of networks.

In order to develop effective networks, alliances, or collaborations, it may be important to build on existing knowledge from a variety of sources. These might include the traditional education literature, organizations such as the OECD and the federal Canadian Social Science and Humanities Research Council (SSHRC, 2004), and from sources not usually accessed by educational researchers such as the literature on collaboration, networking, and alliances from the world of business.

Similar to Lieberman and Grolnick in its view of collegiality in networks is the collaboration described by Erickson et al. (2005), who differentiated the nature of their school-university collaboration from institutional structures such as Professional Development schools or the large-scale consortia of some state-sponsored networks. Erickson et al. instead describe and argue for smaller-scale, informal, and local partnerships between school and university-based educators. One key difference also appears to be the statement of three desirable outcomes which the participants aimed to achieve, making these among the few to aim for creating professional development as an enjoyable experience:

- ...a classroom learning environment that is both fruitful and enjoyable for all of the participants;
- a functional and cost-effective model of professional development with a focus on learning for all of the participants involved; and
- a professional development setting that yields functional and purposeful knowledge for all the participants

Within educational collaborations, the nature of leadership is crucial. Much of the literature points to a non-hierarchical form of leadership, with Rhodes et al. (2001) arguing that there exists a growing realization that “dispersed” or “delegated” leadership is crucial to organizational

success, rather than forms of hierarchical leadership. Within such concepts, teacher leadership is clearly possible and often a reality. They suggest that teacher leadership occurs in three areas:

- Leadership of students or other teachers, facilitator, coach, mentor, trainer, curriculum specialist, creating new approaches, leading study groups;
 - Leadership of operational tasks: keeping the school organized and moving toward its goals, through roles such as head of department, Action Researcher, member of task forces; and
 - Leadership through decision-making or partnership: membership of school improvement teams, membership of committees, instigator of partnerships with business, higher education institutions, school districts and parent groups.
- (p. 62)

This study will consider and potentially expand the areas in which teacher leadership takes place. It will also explore the notion of teacher leadership within teacher unions.

One of the most powerful descriptions of leadership applied in educational settings was described by Jackson and Payne (2002), quoted in Rhodes et al. (2004), and might well form the ideal of teacher leadership within collaborative inquiry groups:

In the literature from the ‘learning organizations field’, it is viewed that leaders are stimulators (who get things started); they are story tellers (to encourage dialogue and aid understanding); they are networkers and problem solvers too. They tend to value a wider social repertoire than has been customary in hierarchical educational settings, in order to encourage openness and to foster and support relationships during times when members are wrestling with ambiguity. They will build trust. They will model improvisation and be comfortable with risk-taking and spontaneity. They will also care, deeply, about teachers and about children and about education because that is the source of emotional energy for others. Intriguingly they will be less personally ambitious, perhaps a long time in post, and will instead be remorseless about improvement. As leaders, they will place priority on the school as a context for adult learning. They will support staff at all levels to be able to make more sense of and interpret the emerging circumstances of school improvement. (p. 115)

These and other sources in the literature on leadership will be used in part to stimulate discussion and reflection on the nature of leadership with those teachers identified as teacher leaders. They will also serve as reference points for considering how the teacher leaders in Canada, Scotland, and Australia reflect or differ from the attributes and approaches identified in the literature.

Context—British Columbia (BC), Canada

BC is the western-most province in Canada, with a population of 3.2 million people. Over half of that population lives in two major urban centres, Vancouver and Victoria. While much of the rest of the population lives within 100 kilometres of the US border, there are centres of population to the north, and the province extends north to the Yukon border and east to the Rocky Mountains.

Kindergarten to Grade 12 education in Canada is a provincial responsibility. BC governments have alternated between conservative parties with several names—”Social Credit”, “Liberal”—and the theoretically left-leaning New Democratic Party (NDP). Currently a “Liberal” government is in power, and is in its second term of office. Prior to starting its first term the Liberals won 77 seats to the New Democrats’ 2 seats. Its first term resulted in a determined

attack on unions and union contracts. In health care, many unionized workers' jobs were removed and replaced with contracted-out but identical positions at about half the salary rate. In education, teachers' contracts were stripped through legislation, and over 2,000 teachers were laid off because of provincial government funding decisions. In the election at the end of their first term, the Liberals still held power but with a much-reduced majority, with seats distributed 45 to the Liberals and 34 to the NDP. The Liberal policies and approaches have moderated in their second term.

The BC education system is tightly controlled by the provincial government while the same government claims much devolution of power to the 60 school districts in the province. Control is maintained through funding, legislative, and accountability structures, including controversial standardized testing in selected grades through the Foundation Skills Assessment (FSA) tests. BC's students perform well on international assessments such as PISA. There are approximately 600,000 students attending public schools with about 10% attending private schools. 42,000 teachers work in BC's public schools and all are members of the BC Teachers' Federation (BCTF). The BCTF has a central office in Vancouver and local and (in some cases) sub-local offices in every school district.

The teacher leader

Saima Fewster is a teacher in School District #57, Prince George, about 800 kilometres north of Vancouver. Her role in the school district is one of district support for teachers with responsibility for supporting the education of students with special needs, or who require Learning Assistance or ESL services. BC has a policy of inclusion, which aims for full integration of students with special needs into regular classes wherever possible, but in reality a range of inclusive, pull-out, and separate classes are provided. Saima is also the President of the Special Education Association—one of 33 BCTF Provincial Specialist Associations (PSAs) which focus on the professional interests of teachers. PSAs publish journals, hold conferences, and their members often represent the BCTF on committees or groups developing curriculum, policy, or resources. Saima's leadership therefore extends into both district and union roles and positions.

The teacher union “critical friend”

Charlie Naylor works in the Research Division of the BCTF in Vancouver, Canada. He has worked with many teacher inquiry groups linked to or funded by the teachers' union, and has seen a surge in teachers taking leadership roles in both their school districts and their union. Charlie taught in secondary schools in the UK and with unemployed youth in Australian community colleges. He recently completed a PhD at the University of British Columbia with a study of teacher inquiry as professional development.

Context—Tasmania, Australia

Australia

Australia's population of more than 20 million lives predominantly on the eastern seaboard of a continent the approximate size of mainland USA, excluding Alaska. Australians are living through intense changes in social, economical, and political conditions; the resultant demands on education—in particular, on school curricula and assessment of student achievement—occur in a context defined by the rhetoric and reality of globalization and of “world's best practice”.

The six Australian states and two territories have the responsibility for school education. In recent years however, the federal government has increasingly exerted control over these eight education systems, as through control of taxation it apportions to the states and territories in return for compliance with federal educational policy and practice. In Tasmania, as in other Australian jurisdictions, this federal control has been applied in combination with the tensions between state-initiated decentralisation of decision-making to local district and individual school level, and centralisation, for example through increasingly rigid system review procedures. It is not yet known how these arrangements will change following the election of a new Labor federal government in November 2007.

Approximately 70 percent of Australian students attend government (public) schools; the remainder attend schools administered by the Roman Catholic Church, and other, typically church-based, organizations. All non-government schools must be registered, and are subject to inspection by government education department officials. Assisted by federal government financial support for private schools, in recent years there has been a drift of approximately 1% of enrolments out of government schools and into private schools.

Tasmania

Situated in the 40s latitudes, to the south of mainland Australia, Tasmania is the country's only separate island state, and has a population of less than 500,000 on a land mass roughly the size of the Republic of Ireland, or twice the size of Vancouver Island. Compared with other Australian states, Tasmania is a relatively poor, rural state with a largely resource-industry-based economy. The OECD (2007) Program for International Student Assessment (PISA) Economic, Social, Cultural Status (ESCS) Index places Tasmania at -0.05 compared with the Australian average of 0.22, USA on 1.4, and Canada at 0.37.

The Tasmanian Educational (School) System

Schooling in Tasmania typically starts with a Kindergarten year (for children aged 4–5 years) followed by seven years of primary, four years of secondary, and two years of secondary college schooling. From 2008, school education is compulsory until age 17.

Tasmania's 210 government schools are comprised of primary (Kindergarten to year 6), secondary (years 7 to 10), and secondary colleges (years 11 and 12), as well as mainly rural district high schools (Kindergarten to year 10).

Class sizes average typically around 25 students in primary classes and 24 students in secondary classes, yet, in many schools, there are classes of 30 or more students. In Tasmania, as elsewhere in Australia, the 1990s were characterized by an ever-increasing flow of statements and policies regarding new priorities for, and consequent expectations of, teachers and schools (Gardner and Williamson, 2005; Poppleton and Williamson, 2004). School accountability processes are also tightening.

The past three decades have seen considerable changes in the role of the principal (Caldwell, 1997); these changes have not abated (Mulford, Silins, and Leithwood, 2004). Likewise, teachers and teacher assistants have noted changes in their work (Gardner and Williams, 2004); this can be described in terms of a top-down, one-way transference of responsibilities. The Tasmanian Department of Education at the system level is currently undergoing its third major restructuring in the past two decades.

Along with a gradual drift to private schools, Tasmanian government schools have seen a population demographic change which has led to there being fewer students in government schools. This trend is projected to continue for the next decade and result in 10,000 fewer students in a system which currently has around 65,000 full-time enrolled students.

The Australian Education Union (AEU)

The Australian Education Union, with 169,000 members nationally, is the largest union representing employees in Australian government schools. AEU Federal is the peak body for Branches and Associated bodies in the 6 states and 2 territories. The AEU provides its members with welfare support and represents them on a range of industrial and professional matters at both state/territory and federal government levels.

The AEU Tasmanian Branch has 97 per cent membership density among teachers in schools and colleges, making it one of the more successful public sector unions in Tasmania. With the contraction of the Tasmanian government school sector in coming years due to demographic change resulting in fewer students and thus fewer teachers, the AEU faces the prospect of downsizing. A smaller AEU will, of course, have reduced capacity to engage with its members in as full a range of activities as it currently does.

The teacher leader

Alison Stone is a member of the Tasmanian Aboriginal community. After leaving high school, Alison began work at the Tasmanian Aboriginal Children's Centre. She then became a qualified child carer and went on to complete a Bachelor of Education Degree at the University of Tasmania in 1998, and then a Masters Degree in 2001. Alison's first teaching appointment, in 2000, was at a high poverty school with a high Aboriginal student enrolment. She now works, on secondment from her current school in Hobart, at Aboriginal Education, where she researches practice in Indigenous education.

A strong advocate of social justice, Alison has endeavoured to show leadership in this area throughout her career. She represented the AEU Tasmanian Branch at a National Aboriginal Educators Conference in 2007. She is AEU Tasmanian Branch Council Delegate elect representing Indigenous educators. Alison is also currently completing her PhD in education, looking at teachers' attitudes and discourse about Indigenous students and how this influences their teaching of these students. Alison lives with her husband and four-year-old daughter, Nikita.

The teacher union "critical friend": Jeff Garsed

Jeff Garsed was a teacher and union activist in Tasmanian schools for 20 years. Completing his Master of Education at the University of Tasmania in 2000, he has worked as Research Officer at the AEU since 2005. This role involves policy development and also writing a range of research and information papers and surveys of members on industrial and professional topics, as well as engaging members in discussion and action on teacher professional issues. Jeff is currently completing his PhD thesis on the subject of teachers' work, with a focus on aspects of teacher autonomy and control in the school context.

Context—Glasgow, Scotland

Scotland is a small country with a population of about five million people, 3,000 schools, and approximately 60,000 teachers. In the past decade or so, the Scottish education system has experienced significant change, based in part on the key stakeholders agreeing to work in partnership after years of conflict. As Ross (1986) and Alexandrou (2008) have shown, the Scottish education system was bedeviled with conflict throughout most of the 1980s. This had the effect of polarizing the key stakeholders, and this situation continued into the 1990s—so much so that an independent committee of inquiry into the pay and conditions of service for Scottish teachers, headed by Professor Gavin McCrone, was set up by the then Minister for Children and Education, Sam Gailbraith. This was in response to the breakdown in negotiations over pay and conditions between employers and unions in 1999 (McCrone, 2000: 1). McCrone's final report (2000) not only made recommendations in relation to pay and conditions, it also significantly made recommendations in relation to the continuing professional development (CPD) of teachers. In the spirit of partnership, all the key stakeholders in Scottish education agreed to the recommendations (commonly referred to in the early days as the *McCrone Agreement* and presently referred to as the *21st Century Agreement*) and it is fair to state that this can be regarded as the beginning of the slow process of rapprochement between the stakeholders in Scottish education and the creation of a unique partnership between them. This partnership is trumpeted in the introduction to the agreement as follows:

...areas of agreement and the detail covered have been achieved through a unique process of discussion and dialogue among employers, teacher representatives and the Scottish Executive...We have agreed that, for the future, the working relationships between teacher organisations, employers and the Scottish Executive will be based on mutual respect and understanding, on shared responsibility and on the shared development of ideas and programmes for change (SEED, 2001: 2).

Greater partnership working has been notable in the area of CPD. All the stakeholders have got together to support and promote not only the 35-hour CPD element of the *21st Century Agreement*, but also more importantly teachers are gaining Chartered Teacher (CT) status, more commonly referred to in other nations as Expert Teacher status. This has led to the Educational Institute of Scotland (which is the largest teachers union in Scotland, representing 80% of the profession) creating a new tier of lay representation in the form of Learning Representatives (LRs) (described in some detail by Alexandrou and O'Brien, 2007; Alexandrou, 2007), which advises and guides teachers on the CPD and CT opportunities available to them. Thus, it seemed a natural route to take for this project to invite one of the EIS LRs to be the participant trade union activist for the initial stage of the project and Hugh Donnelly, a veteran activist, agreed to be the Scottish participant.

Educational Institute of Scotland (EIS)

The EIS is the biggest teacher union in Scotland. It was officially formed in 1847, and in Belford's (1946: 63) history of the EIS celebrating the Institute's centenary, he states that:

...not merely for mutual benefit did these teachers associate; believing in the worth of human personality, they wished to proclaim the necessity for education and establish the value of sound learning.

The Institute was further strengthened when, in 1851, it was granted its first Royal Charter, with the guiding principle of the Charter being the upholding of educational standards (Belford, 1946: 327–334).

Thus the foundation stones were laid not only for the EIS as a representative body but as an organization that would seek to put the education of the populace at the core of its mission and invest in the CPD of its members. This tradition seems to have been maintained to this day by the Institute's response to the challenges laid down by the *21st Century Agreement*, in relation to teacher CPD and the creation of a new cadre of representatives in the form of LRs. Thus, it is fair to state that the leadership capacity and capabilities of the union's activists, particularly the LRs, will play a key role in helping the Institute achieve its historical objectives.

Currently, the EIS has just over 60,000 members, which equates to representing just over 80% of teachers in Scotland, covering the nursery, primary, secondary, and special education sectors, as well as representing lecturers in further and higher education and as the "...oldest teaching union in the world" it reaffirms its guiding principles by stating it "...has a firm commitment to quality education provision for all young people" (EIS, 2008; Macaulay and Maclean, 2006).

The teacher leader

Hugh Donnelly has been teaching English in Glasgow, Scotland, for 29 years. He has also been active in the EIS for many years, school, local, and national levels. He is committed to improving the quality of comprehensive state education under democratic control against cutbacks, selection, and creeping privatization. This includes campaigning for reductions in class sizes and for improvements in salaries and conditions of teachers. Most recently, he has been responsible for formulating the union's policy on coaching and mentoring. Hugh is also a LR in Glasgow, facilitating, supporting, and advising teachers on matters of professional development. He is of the opinion that the issue of leadership and the direction and emphasis of professional development in the next decade or so will be of significant interest and importance within the teaching profession.

The teacher union "critical friends"

Alex Alexandrou

Alex has worked extensively in the fields of CPD, human resource management (HRM), and industrial relations in both the public and private sectors, as both an academic and a practitioner. He recently completed an EdD at the University of the West of England with a study of the EIS's first cohort of LRs. Alex continues to evaluate the EIS LRs initiative as well as taking a keen interest in teacher leadership developments. He is a freelance academic, research associate with the School of Education, University of Edinburgh, honorary secretary of the International Professional Development Association, and an associate editor of the *Journal of In-Service Education*. He has published widely and has recently written *Partnership Out of Conflict: The Emergence of the Educational Institute of Scotland's Learning Representatives* (2007).

Jim O'Brien

Jim is currently the dean of the School of Education, University of Edinburgh, and also director of its Centre for Educational Leadership. He was a secondary school teacher of history and a Principal Teacher (Guidance), teaching in comprehensive schools in the west of Scotland, before taking up a career in higher education. His development work and research interests lie mainly in the field of CPD, school improvement, and school leadership. He has been a member of a number of national development groups associated with teacher development and leadership themes, including the group responsible for the *Scotland Background Report for the OECD Activity on Improving School Leadership* (2007). Jim is co-editor of Dunedin Academic Press's Education Policy and Practice Series, an elected board member of the International Congress on

School Effectiveness and Improvement, current president of the International Professional Development Association, and an associate editor of the *Journal of In-Service Education*.

Initial observations

The following observations are tentative but are supported by data. We believe that these are not discrete but are connected in ways that we can sense but at this stage cannot fully articulate. We anticipate that as the research progresses we may be able to clarify how they connect.

1. Leadership roles evolved “naturally” and were not planned.

By this the participants meant that there was no vocational desire to be a leader, nothing pre-conceived, but that they became leaders gradually after participating in roles or jobs over time. Neither was there any moment where leadership became announced—the teachers to some extent assumed and to some extent were recognized as leaders by their peers, by their school district, or within their union, often assuming a number of roles:

“I chaired school-based teams, participated in screening committees, organized parent and teacher workshops on learning disabilities, team-taught with colleagues, and led professional development sessions for staff members on school projects and programs. A key support for me during this time was the Local Specialist Association for learning assistance (an organized teacher group within the local union), that later evolved into a local chapter of the provincial Special Education Association. This group was a voluntary professional development arena for its teacher members, as well as a vehicle for collegial sharing and support. Our meetings provided valuable, current information about what was happening in the field of special education, created professional connections with colleagues from other schools, and offered a voice for us to collectively respond to district and provincial bodies on issues of great impact to our teaching and our students. I gradually worked my way through every executive position in this association and still continue with them.” (Saima, Canadian teacher)

Because the unions had some structure, the teachers could move through a range of positions. Because the unions had a wider frame of reference than a single school district it also allowed for provincial (in Canada) networking, thereby facilitating contact and dialogue with others working provincially. To some extent, this “experience in the bigger pond” built confidence and individual capacity:

“Within a year, I was drawn into the executive of the Special Education Association, a provincial specialist association of the BCTF. I moved through several executive positions and have served as president of the organization for four years. Where our local association provided collegial support and learning at the district level in my earlier teaching years, this provincial, union-led organization has greatly expanded my network of colleagues, contacts, knowledge base, and resources, while at the same time increasing my capacity to engage in activities to advocate for other teachers and the students we serve. My involvement in this association was the catalyst for increased participation in the provincial union and my connections with the BCTF organization. Never having considered myself an activist, it is the project work of this time period with the

SEA, with other provincial specialist groups, and with BCTF staff that influenced my thinking about how to contribute to my profession in a meaningful way.”

2. Leadership occurred and evolved when the teachers felt passionately about tasks or approaches that they felt must be completed or addressed.

The three teachers each described, in different ways, that there was a job to be done—supporting teachers’ professional development, maximizing the inclusion of students with special needs, addressing social justice issues linked to aboriginal students. Each of the teachers joined a group, undertook a job, or taught a course because the task needed to be completed. Once there, their intense interest in the task led to positions of leadership. Data reflect the teachers’ passion for their work and for the tasks before them, a passion that enabled them to lead because they had conviction about the work to be done. Hugh Donnelly, a teacher from Glasgow, Scotland, spoke of his passion for a form of professional development that met teachers’ needs and how he approached the task of involving teachers in PD:

“I try to do it with varying degrees of success. I will make contact with teachers pro-actively, and try and interest teachers in ideas, whether it’s international education or developing teacher portfolios. As a shop steward, as a union rep, I try and set an example and give arguments that challenge simplistic management agendas. I tell people they can make a difference. I encourage teachers’ behaviour as responsible autonomous professionals.... We as teachers have a voice and we should have the confidence to express that voice.”

Hugh clearly articulates union-led or supported PD as an alternative to “management” PD, but he passionately champions and challenges teachers—stressing their “voice” but also stating that they are “responsible” while also being autonomous. Both championing and challenging are articulated as tasks, and because they are overtly stated they engage teachers and encourage responses and discourse. Such encouragement, we argue, reflects a form of teacher leadership—catalytic in terms of discourse and fostering and encouraging capacity.

Saima Fewster similarly discussed her passion:

“I would describe myself as a life-long learner who is passionate about sharing my learning with others, and believe it is this trait, combined with a sense of commitment and responsibility to others, that has guided my educational experiences to where I am today.”

3. Leadership was not necessarily immediately recognized, as it was assumed rather than proclaimed.

If a person takes a position, say as a principal in a school, then some assumptions can be made about power, control, and leadership. There may be very different approaches which could be hierarchical or collaborative. But while the three teachers later assumed some positions which contained elements of formal leadership, their early experiences were that leadership was not explicit, not within a stated position or role. It evolved and emerged from activities in which they emerged with some recognition from peers of their implicit leadership role. Once assumed it then led to more formal recognition at some future stage.

Because leadership was gradual, it was not always overtly recognized. Thus leadership tended to be reflected in tasks being completed or issues addressed with an implicit understanding that the process was being led but without the overt identification of one individual as leader.

4. Credibility among peers was crucial to taking leadership roles.

Saima Fewster spoke of very collegial meetings of teachers within her own professional association, the Special Education Association, which is part of the BC Teachers' Federation. She said:

“It was very easy to work with colleagues in PD—there was support and collegiality. In that collegiality I also had a mentor who did a lot of encouraging, recognizing strengths. She did a lot of arm-twisting, and provided lots of opportunities to build leadership, but there was always a context—a place, an issue, a conference where these skills could be built.”

Both Hugh (Scotland) and Alison (Australia) also stressed peer credibility, and their sense of collegiality was a collegiality of equals. They both articulated being able to offer skills and information in ways that allowed for reciprocity, and in ways that did not elevate their own status in a hierarchical sense. There was a sense that they felt the need to earn credibility rather than assume it, and that credibility was generated during the processes of engagement with other teachers.

5. Some of the teachers had very positive role models, who both modeled leadership and supported and encouraged the teachers to assume particular forms of leadership.

Alison Stone, from Tasmania, spoke of a mentor who had both recognized and nurtured her professionally. The mentor modeled a form of leadership that was encouraging and facilitative, and encouraged Alison to build her confidence and skills, to further her education and experience, and to assume leadership herself. It was through such mentoring that she started to have belief in her own capacity to offer leadership and to apply and adapt the forms of leadership she saw being modeled. At one stage in our discussions she said:

“I had a friend who was a medical doctor who encouraged me to go to university, and a principal who encouraged me in my teaching. So now I had two people who believed in me. The principal recognized my teaching ability—gave me positive feedback. I saw her doing PD and encouraging people in a very positive way, identifying the unique qualities everybody had and building on them.”

Next steps

We are at a very early stage of this research, barely starting to understand the stories of Saima, Alison, and Hugh as they describe their world, their work, and their leadership. We see some commonalities and some differences—Hugh perhaps the most active in both the industrial and professional sides of unions; Alison bringing an aboriginal identity to challenge racist norms and to support aboriginal learning; Saima bridging her dual roles in a northern Canadian school district and in the province-wide teacher union. While geography and context differ widely, they all share a passion for teaching and for meeting students' needs. They all share a strong empathy for their peers and want both to work with them and to support them because they see the potential to achieve better education for students if this occurs.

Some of our next steps are to articulate what these similarities and differences are, and to explore them in more detail. We aim to better understand what leadership is for these and possibly other teacher leaders, and to consider how teacher unions can better develop a future generation of leaders. What attributes and skills are needed? How might they be applied? What are the contexts where leadership occurs and how does leadership impact other people, programs, structures, and organizations?

We likely need to review our data collection approaches and to build more systematic data collection and analysis. But we need also to share more conversations where we can explore and understand the notions of leadership.

We may also extend the scope of the project, to include more participants within the three countries and possibly to add participants from other countries. We aim first to share our thinking with colleagues in the Teachers Work/Teacher Unions AERA SIG, and to generate debate about the notion of teacher leadership in teacher unions and how this might be understood and extended.

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