

Who are the School Leaders of Tomorrow? Phase Two of an International Teacher Union Research Project

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Introduction

At the 2008 AERA Annual General Meeting, some of the authors of this paper presented their first year's research into the issue of educational and teacher leadership. This paper represents an extension of that first year's work which developed an international network of SIG members with an interest in educational and teacher leadership within teacher unions. The first year:

- explored a limited area of literature,
- considered context in three countries or educational jurisdictions and in teacher unions (British Columbia Teachers' Federation—BCTF, Canada; Educational Institute of Scotland—EIS, and the Australian Education Union—AEU.)
- created a Wiki for sharing information and drafting paper
- identified and interviewed three teacher leaders, one from each country
- stated five tentative observations from the research.

In this second year, we have:

- expanded our literature reviews (see: Charlie Naylor's literature review http://www.bctf.ca/uploadedFiles/Publications/Research_reports/2008EI01.pdf)
- Jim O'Brien, along with his colleagues, Daniel Murphy and Janet Draper, produced a second edition of their book entitled *School Leadership* (ISBN: 978-1-903765-93-7)
- added researchers and teacher leaders from the USA, England, and the Republic of Ireland to the network
- expanded the Wiki
- conducted a video interview to further explore the observations from Year 1
- seen the research act as a catalyst in terms of leadership issues within teacher unions.

This paper shares the second year's work of this Teacher Union SIG network.

Why should teacher unions address issues of educational and teacher leadership? Six reasons are suggested:

- demographic changes in public school systems will affect school district and teacher union leadership structures and capacity
- there appear to be limited attempts at coherent succession planning in both school districts and teacher unions
- competing and ideologically-opposing approaches to leadership exist, some more empathic to teachers and teacher unions than others
- one view of educational leadership is that most leadership should be in the hands of school-based administrators in a school or site-based managed system, a perspective which, if realized, would be likely to reduce teacher leadership

- current approaches to developing professional learning communities in some Canadian school districts are exposing dichotomous views of leadership
- the development of teacher and distributed leadership could become a focus for teacher unions in Canada and teacher unions could choose to develop leadership capacity in a range of areas (professional, social justice, etc.) as organizational priorities.

Who are the teacher leaders, and who are the researchers?

We are hesitant to draw explicit demarcation lines between “teacher leaders” and “researchers”. This is because as the research evolves it has become clear that the teacher leaders are also researchers as they reflect on their evolution into leadership roles, and on the nature of the work they do. The researchers are somewhat akin to the notion of “critical friends” who discuss and perhaps extend and connect the teacher leaders’ comments and thinking. So we consider the following as broad descriptors:

“Teacher leaders” in this research proposal are those teachers identified as:

- positioned to lead within a school district and a teacher union
- having some experience of leading or promoting initiatives
- knowledgeable about systems in which they work
- experienced in collaboration and facilitation.

“Critical friends” in this research proposal are:

- associated with some of the projects undertaken by the teacher leaders
- involved in outside agencies such as teacher unions or universities
- connected to the AERA Teachers’ Work/Teacher Unions SIG.

Swaffield (2004), in reviewing the literature on the concept of critical friends, stated:

A critical friend has been described by Costa and Kalick (1993) as “a trusted person who asks provocative questions, provides data to be examined through another lens, and offers critiques of a person’s work as a friend”.... Other descriptions by Brighouse and Woods (1999), McDonald (1989), and Stoll and Thomas (1996) emphasize the critical friend helping schools make sound decisions, challenging expectations, patiently playing a role that is interpretive and catalytic.

The wider debate

The Organisation for Economic Co-operation and Development (OECD) has opened up a significant debate in relation to improving school leadership. It argues that school leadership is high on the policy agenda of most governments, and that the role of school leaders is changing at a significant pace to keep up with the demands of political leaders that their education systems can equip young people with the knowledge and skills required for their economies to compete in the global marketplace (OECD, 2008: p.1). Additionally, Her Majesty’s Inspectorate of Education (HMIE) (2007) has identified the need for succession planning to be in place, particularly as education systems in many developed nations are experiencing significant

demographic changes in terms of large numbers of principals and teachers leaving the profession.

The OECD (2008: pp.1–5) is seeking to understand what “...leadership roles are most effective in improving student learning” and has identified what it terms “...four policy levers which taken together can improve school leadership practice”. The four levers are: (re)define school leadership responsibilities; distribute school leadership; develop skills for effective school leadership; and make school leadership an attractive proposition. Taken as a whole, the aim is to ensure that through improved teacher leadership, practice, and school results, developed nations in particular will produce the workforce of the future to ensure they are competitive in the global arena.

Our view is that if this is to be achieved then governments, school districts/education authorities, and senior school leaders need to be innovative in their approach to identifying leadership potential and talent within their schools. We argue that such talent exists within all schools and that it is being nurtured in some cases by the schools or their principals but also by teacher trade unions in the form of teacher lay representatives and other union members’ roles. Evidence from our study shows that these teacher unionists are becoming the school leaders of the future more by accident than by design, and schools and principals should take more notice of these individuals because of their leadership attributes and characteristics.

Objectives

The primary objectives of the paper are to:

- consider why teacher union representatives take up leadership positions with a professional or industrial focus
- highlight the cultural differences between educational systems and nations by comparing and contrasting the experiences of the participants in their respective leadership roles
- examine the feasibility of disseminating our research findings through mediums such as a Wiki, YouTube, and Teachers’ TV
- consider how best to connect SIG members in-between AERA meetings in order to further disseminate findings and strengthen the SIG network.

Research methodology

The methods used in this study continued those used in the first year, namely discussions using a series of questions and a number of quotes on leadership to stimulate discussion. Usually there were three people involved in each E-Illuminate interview: the teacher leader, and the two principal project researchers. All interviews were recorded and accessible to other members of the research team.

One new approach in terms of methodology this year has been using video to record interviews. Using video has enabled the research team to engage in conversation with the teacher leaders in similar ways to the audio conversations on E-Illuminate, with the additional bonus that the videos can be shared with others to illustrate and explore some of the ideas and analyses generated within the research. During this shared viewing time, those enrolled on the E-Illuminate discussion can pause the video at any time to share comments and reflections, thus exploring ideas and themes in discussions.

These conversations took some of the five preliminary findings from the first year of the project as the basis for further exploratory conversations, which were:

1. Leadership roles evolved “naturally” and were not planned.
2. Leadership occurred and evolved when the teachers felt passionately about tasks or approaches that they felt must be completed or addressed.
3. Leadership was not necessarily immediately recognized, as it was assumed rather than proclaimed.
4. Credibility among peers was crucial to taking leadership roles.
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.

As one example, during the second-phase video interview, one Canadian teacher-leader used the metaphor of “stepping stones” to describe the various stages of her move into leadership work and positions. The steps were in terms of:

- a. **Context.** This involved moving from a group of peers in a school to working with others in the union and in the school district, then at a provincial level within the union through the BCTF’s Provincial Specialist Associations. Each step essentially widened or expanded the context.
- b. **Skills.** As the teacher’s passion for the issues she was addressing (education for students with special needs) evolved, and the context widened, so did her skills “move into different gears”. From informal conversations the teacher leader became a facilitator of meetings, developing and honing skills of extending conversations, probing, and challenging. She connected the discussions to decisions that led to action and ensured that communications were effective and regular.
- c. **Relationships.** We are finding that this teacher leader is building ongoing relationships which mirror equity and empathy. The leader exerts no hierarchical authority but has developed considerable influence by building respectful but productive relationships where the task and the focus is as important and as explicit as building collegial and collaborative relationships. It may be easier to develop leadership in groups where there is consensus on focus and tasks, but this teacher-leader also demonstrated skilled capacity in maintaining relationships even in difficult contexts and with a range of personalities.
- d. **Influence.** Our understanding of influence is somewhat tentative at this stage. As the teacher-leader extended her steps in terms of context, skills, and relationships, it also appeared that she was gaining in influence. To some extent, this reflects the “wider stages” of the union’s provincial forums, but it also reflected growing and expanding peer acceptance of her leadership skills and initiatives.
- e. **Commitment.** Initial commitment at the school level is to a role within the school, not to any form of leadership. Leadership evolved from a continued presence in meetings and forums where the teacher-leader gradually stepped into leadership roles. But once forms of leadership were established, an implicit commitment to the leadership role was made. Thus the stepping stone in terms of commitment involved a realization that such a role would be maintained over time, allowing for some consistency in meetings and during projects.

Literature review

Myriad texts on different approaches to leadership and what makes a good or effective leader are published annually. A broad but not necessarily deep literature on leadership styles and behaviours and what leaders must do exists. There is significant expenditure on recruiting and training people to be leaders in industry in the anticipation that such personnel will make a difference to organizational performance. The charismatic approaches of successful business leaders who have turned multi-national companies around in high profile ways are held up as exemplars alongside and in contrast to those others who inspire followers through their values or way of life, including, occasionally, political leaders. However, the recent banking and economic crisis has brought some of that into question. No matter the nature of their behaviour or authority, leaders clearly lead only because others follow.

Leadership is viewed as a skill and an art, with human relationships at its core. When considering the nature of leadership in schooling, it is useful to consider both the nature of leadership and its purposes. Understanding of leadership practice is further complicated if the purposes leadership should serve, in a particular context, are unclear, or contested, which in relation to schooling is invariably the case. Problematic conceptions of the purposes of schooling inform the literature of school leadership: some, for example favouring effectiveness of schooling as measured by exam performance of students, over, for example, the clarity of the moral message which the school projects, e.g., in certain jurisdictions there is a clear expectation that a wider set of school functions, well beyond the development in their pupils of a functional competence in key skills, should prevail, such as addressing Inclusion and Equality; Values and Citizenship.

What forms of leadership are being promoted within educational systems with centrally-mandated provincial or state directives? What approaches to leadership are being developed within professional learning programmes or communities or in teacher inquiry groups? Might a school principal be directive or collaborative, and how might these differing approaches to leadership affect teachers and school communities? While mindful of the importance of context, there is ample evidence that, whatever the context, there will be diverse and sometimes competing views on appropriate forms of leadership, whether to implement (or to challenge) a mandate, to develop a learning community, to lead within a school, school district, or teacher union.

There are clear stages in the evolution of leadership theory. Historically, the perception was that leaders were born not made. Initial research on leadership centered on figures who had made their mark on events—the generals and monarchs or influential “great men” view. Subsequent research inspired by this notion focuses on traits or personality characteristics discernible in such people. The military for many years were concerned with identifying key characteristics and training their leaders appropriately. This tradition reflects the belief that what a leader does is important and that the skills of leadership can be learned and developed. What it is that leaders are expected to do, now influences leadership development programmes, and this is particularly true in relation to schooling, where the emphasis has been traditionally on management reflecting hierarchical organizations.

O’Brien et al. (2008: 16–17) cite Southworth’s (1998) work providing a more school-focused discussion of leadership theories, justifying a more limited “set” of pertinent leadership approaches:

- situational leadership
- instrumental and expressive leadership
- cultural leadership
- transactional leadership
- transformational leadership.

Southworth suggests these are more applicable to schools than other theoretical constructs.

Recently, Leithwood and Riehl (2005) made “four strong claims” concerning why school leadership is important in education:

1. School leadership makes important contributions to the improvement of student learning.
2. Leadership in schools is exercised primarily by principals and teachers and may be distributed to others as well.
3. A core set of basic leadership practices is valuable in almost all contexts.
4. Successful leaders in schools serving diverse student populations establish conditions that support student achievement, equity, and justice.

School leadership—normally referring to principalship and substantiating Gunter’s critique (2001), that leadership studies have often conflated leadership with leaders, and in educational terms defined leaders according to position in schools—continues to be deemed important in a range of policy documents and in the international research literature. However, Harris and Townsend (2007) argue that “there is a powerful amalgam of forces eroding leadership capacity in the school system,” and make a case for reconsidering forms of leadership required to address such eroding of capacity, in particular offering support for “lateral” and distributed rather than “vertical” and hierarchical forms of leadership. In both education (Hargreaves and Fink, 2006; Robertson, 2008) and business (Parise and Sasson, 2002) there is evidence that new and evolving forms of leadership are often distributed and facilitative rather than directive and hierarchical.

Gronn (2003) argues that in reality many people in school exercise leadership, including unpromoted teachers (teacher leaders) and students, and that stand-alone leadership simply does not (and cannot) exist in schools. He distinguishes several levels of interaction and joint action, including spontaneous collaboration arising from common interest and concerns; “intuitive working relations” where over a period, working relationships develop to the point where interactions between familiar partners become smooth and collaborative where the basis of development and progress thus becomes effective collaborations rooted in mutually rewarding working relationships; and working partnerships involving short-term working groups or longer-term collegial structures. Of course, all school staff play substantial leadership roles within school communities. The range of such leadership is considerable, and includes peer leadership within staff rooms and key work groups, for example in involving staff in community events beyond the classroom. There is curricular and instructional leadership from effective teachers, and community leadership from office and reception staff who set a responsive and inclusive tone for the school. There is leadership from school caretakers who take a pride in putting safety first. Few of these illustrative instances of leadership derive from hierarchically-ordered positions of power or influence.

Such formal and informal leadership has been described by Hess (2008: 11), stating that:

Informal leadership is all about relational power. Informal leadership occurs when one particular staff member walks into the lunchroom and gets everyone laughing and feeling good about coming to work that day. Informal leadership happens

when penetrating questions, the ones that really need to be asked, are asked at a staff meeting before a crucial decision is made. Informal leadership emerges when a thoughtful teacher steps into a principal's office, closes the door, and offers stellar advice. It transpires when a master teacher informally shares curriculum with an inexperienced teacher, or when a new teacher shares what she is learning in her graduate class with her grade-level team. Starting a science club is an outbreak of informal teacher leadership.

While recognizing that the evidence supporting distributed leadership in schools is necessarily limited given its recent entry into the pantheon of leadership approaches, Spillane (2006) argues that leadership should be considered as organizational functions rather than being tied to specific positions or titles, and that the distribution of leadership could be different depending on:

- leadership function (e.g., instructional leadership)
- subject/area of focus (Language Arts and PD tend to incorporate more distributed leadership than Math or Science)
- school type (with private/entrepreneurial schools more likely to distribute leadership)
- school size (the larger the school the more leaders), and
- school development stage (fitting leadership to the appropriate stage of development rather than selecting a fixed formula).

What is clear from this brief foray into the literature is that there is a growing appreciation of the possibility of multiple leadership roles in our schools. How do we prepare for this? How do we encourage this development, and who might be involved and in what ways? The case studies reported in this paper shed some light on such questions.

The Case Studies

Republic of Ireland

The Republic of Ireland (RoI) occupies approximately four-fifths of the island of Ireland, which has a total area of 84,421 square kilometers. It is located in the extreme north-west of the European continent, and is surrounded on three sides by the Atlantic Ocean. The geography and history of the RoI have been shaped over the centuries by contacts with its eastern neighbour, the United Kingdom, across the narrow passage of the Irish Sea.

While the populations of many European countries are in decline, in the RoI the trend is the reverse. The most recent census recorded an increase of almost 2% in the population, due to the combined effect of natural increase and migration, bringing the population estimate to 4.42 million. Figures also reveal that Ireland is a relatively young population, with one the lowest proportions of elderly people. It is therefore less affected by ageing compared to its European neighbours.

Approximately 13% of the population can be described as non-Irish nationals. Up until recently, the government's liberal attitude to immigration and the economy has resulted in high numbers of Eastern Europeans (predominantly Poles, Lithuanians, Latvians, Slovaks, and Romanians) seeking work in Ireland. Most are legally employed, but in relatively low-skilled occupations. Countries of origin of other immigrants include the UK, Nigeria, the US, China, Germany, and the Philippines. While many non-Irish nationals settle in large urban centres, such as the cities of Dublin and Cork, a significant proportion gravitate towards provincial towns. For example, 40%

of the 2,646 residents of the small town of Gort, in County Galway, are non-nationals, and of these, approximately 80% are Brazilian.

The RoI is a parliamentary democracy and a member of the European Union since 1973. While there are a number of important political parties in the state, the political landscape is dominated by two main competing parties who occupy the traditional centre ground.

The RoI has a long tradition of valuing education. As a result of a sustained investment in education, the RoI now has one of the highest educational participation rates in the world: 81% of Irish students complete second-level, and approximately 60% go on to higher education. Internationally, Irish 15-year-old students are amongst the top performers when it comes to reading literacy (5th out of 29 OECD countries, and 6th of the 59 countries participating in PISA), significantly above average in Science, and in line with the average across the OECD in Mathematics. Responsibility for education lies within the Department of Education and Science (DES). The DES administers all aspects of education policy, including curricula, syllabi, and national examinations. Attendance at full-time education is compulsory in the RoI from six to fifteen years of age, and is free in the majority of schools, and at undergraduate third-level. Education is considered a fundamental right under the constitution of the RoI.

Although children are not obliged to attend school until the age of six, 65% of four-year-olds and most five-year-olds are enrolled in the infant classes in primary schools in the RoI. In this way, much of what is considered pre-school education in other countries (from age four to six) is provided, free of charge, for all children in the RoI. Primary schools operate an eight-year programme, consisting of two Kindergarten years (Junior and Senior Infants), followed by classes 1st to 6th.

The primary education system emphasizes a child-centred approach, and is founded on the belief that high-quality education enables children to realize their potential as individuals and to live their lives to the fullest capacity appropriate to their particular stages of development. The primary curriculum (revised in 1999) provides for an extensive learning experience and promotes a rich variety of approaches to teaching and learning. The curriculum reflects the educational, cultural, social, and economic aspirations and concerns of Irish society. It also takes account of the changing nature of society and aims to help children to adjust to these changes. There are no formal examinations at the end of the primary school cycle.

There are 3,160 primary schools in the RoI, containing over 440,000 children. More than half of the schools are very small, rural schools. The state employs almost 26,000 primary-school teachers, all of whom are required to register with the regulatory body, the Teaching Council.

The Irish primary education sector consists of state-funded primary schools, special schools, and private primary schools. State-funded schools include religious schools, non-denominational schools, multi-denominational schools, and Gaelscoileanna.

National schools date back to the introduction of state primary education in the mid-19th century. They are usually controlled by a board of management under diocesan patronage, and often include a local clergyman. The term “national school” has of late become partly synonymous with primary school in some parts. Recently, there have been calls from many sides for fresh thinking in the areas of funding and governance for such schools, with many wanting them to be fully secularized.

While Gaelteacht areas have always had Irish language National and Secondary schools, Gaelscoileanna are a very recent movement, started only late in the 20th century. The Irish language is the working language in these schools, and they can now be found countrywide.

They differ from Irish-language National Schools in that most are under the patronage of a voluntary organization, Foras Pátrúnachta na Scoileanna Lán-Ghaeilge, rather than a diocesan patronage. Nearly 10% of all school children attend Gaelscoils, with 368 schools across the country making it the fastest-growing education sector.

Multi-denominational schools are another innovation. They are generally under the patronage of a non-profit limited company without share capital. They are often opened due to parental demand, and students from all religions and backgrounds are welcome. Many are under the patronage of a voluntary organization, Educate Together.

English is the primary medium of instruction at all levels, except in Gaelscoileanna: schools in which Irish is the working language and which are increasingly popular.

Teacher union

There is one primary teacher union in the RoI (the Irish National Teachers' Organisation—INTO) whose membership comprises teachers in ordinary schools, special schools, and primary principals and deputy principals. The INTO also represents primary and post-primary teachers in Northern Ireland (part of the UK). Established in 1868, among the main aims of the INTO are: collective bargaining, improving terms and conditions, regulating relations between members, offering support and advice, and promoting the interests of education. The INTO regards itself as a non-party, non-sectarian, non-sexist, and non-racist organization.

The teacher leader

Anne Marie Collins is a young classroom teacher in her seventh year of teaching at primary level. She is responsible for a multi-level class of 5–7-year-olds (Senior Infants and First Class) in a school in a provincial town in the West of Ireland. The school is classified as educationally disadvantaged. As the “staff rep” in her school, she is responsible for communicating information from the INTO head office to her colleagues. This entails distributing the monthly magazine (InTouch), sharing correspondence with staff, encouraging attendance at quarterly meetings, supporting elections for regional representation at local or national meetings, returning ballot papers, and organizing functions for retiring teachers. She is a member of a finance sub-committee, and attends the quarterly meetings for teachers in her area, where she pays close attention to the discussion and debate. All activities for the union are conducted within her own time, as she has no substitutable release time to undertake these tasks. Her current school principal (as well as her previous one) is also a member of the same union and encourages the participation of all staff.

On a professional level, Anne Marie has been active in supporting literacy initiatives in both her previous schools as well as in her current school. The sense of collegiality and shared understanding developed with her colleagues, especially other classroom teachers, has enabled her leadership qualities to emerge.

The teacher union “critical friend”

Regina Murphy is a Senior Lecturer at St Patrick's College, Dublin City University, Dublin, Ireland, where she teaches, designs, and directs post-graduate courses at diploma and master's level. She is a former primary school principal who taught for several years in schools in Ireland, New Zealand, and England. She has been a member of several collaborative teams at national level in the research and design of curricula and in the provision of in-service courses for teachers. Regina is co-chair of the recently-established International Professional Development Association (IPDA)-Ireland, a North-South, cross-border collaboration, and was recently

nominated as the Ireland representative on the IPDA (UK) committee. In the summer of 2008 she was elected to the executive board of the International Society for Music Education (ISME).

Anne Marie's views of leadership

When asked how she viewed leadership, Anne Marie started off by saying that in her opinion and experience there are lots of different elements to it. She expressed the belief that it is not only about obviously leading people, but it is about “bringing them with you”. Anne Marie expanded upon this point by explaining that if you want to get people involved in the union, then you must be seen to be involved and active yourself. For her, this means taking part in union activities at school and local level, and being ready to express her opinion about various issues as they arise. This implies that Anne Marie sees the need to keep herself informed and abreast of developments, and this is something she is prepared to do. She emphasized that leadership is also about building bonds between people and recognizing the need to respect, and take on board, other people's views. Although still in an early career stage, Anne Marie has had experience of different staffrooms as a permanently employed teacher. She recognizes immediately that the cultures of schools can differ and that teachers from different schools can have different views on certain issues.

Although having humble beginnings as a union member, Anne Marie has experienced how her colleagues begin to seek her advice and act as a spokesperson for the union. She is therefore thrust into a leadership role.

Anne Marie's experiences of leadership grew from her participation in a literacy initiative in her previous school. During her time in this educationally disadvantaged setting, she volunteered for professional development activities and training so that she could become a facilitator of a programme in her school. This programme was a government-backed initiative, and it was up to each school as to how effectively it was implemented. She agreed to lead other colleagues in the implementation of the initiative during one school year—a task that she found to be quite daunting at times. She felt that if this programme was to be effectively introduced and assimilated into her school, then research was required to back up her claims of the validity of the programme and to convince her colleagues. Two months after the programme had been introduced, a significant number of her colleagues had not implemented the programme in the classroom, and so she decided that she would implement it in the first instance with the 6–7-year-olds. Consequently, she set about getting four of her colleagues that taught this age range on board with her. After that, she arranged for the team to meet once a week to share lesson plans and tell each other what they were doing. This approach (and what we would term positive leadership) encouraged her colleagues to try out new things after these planning meetings.

Anne Marie stated that what she was trying to achieve was that she and her team were leading by example by doing, implementing the writing programme within their own classrooms. Anne Marie then found that she was meeting with her colleagues on an informal basis for ten minutes here and there and chatting about their experiences in relation to implementing the programme, and with that, change began to take place.

Reflecting on the process, Anne Marie has come to the realization that leadership encompasses the building of relationships amongst colleagues through encouragement, support, and facilitation, as well as being prepared to be involved in the target action oneself. The process needs to be collaborative, and it is important to understand what is working and what is not when introducing a new approach to teaching, and then reaching an agreement as to the best way forward. She also believes that leadership is about developing the ability to understand where teachers are coming from. For example, newly qualified teachers and veteran teachers will have

different viewpoints about various initiatives, with the latter having witnessed many changes during their time and less inclined to change their working practices.

Yet, she is of the view that if you can involve people in making decisions, then this will not only be positive, but will also get colleagues involved in helping to introduce programmes into schools and union activities. Even after a few short years teaching, she recognizes the importance of participative decision-making as a core principle of leadership.

Enculturation into the union

Anne Marie reported that one of the union's initiatives last year was to get younger members actively involved in the union. A special conference for teachers in their early career stage was held and Anne Marie found this to be very informative. In her view, to be an active member, "you cannot just talk the talk, you need to show that you can walk the walk". She stated that currently the union has a lot of young members and that they need to be encouraged to get involved. In so doing, they will then have a say in how the union works in the long-term and affect decision-making.

A significant influence on Anne Marie's participation has been the encouragement that she has received from management in both schools. This is not unusual in the Republic Ireland, as all teachers are strongly encouraged to be members of the one union, and special interest groups are accommodated within it. With such a long history that is closely entwined with the culture of primary teaching, the INTO has worked hard to preserve its status in Irish education and its exclusive relationship with teachers and principals through many years of campaigning and negotiation. Although another professional body for school principals and deputy principals has emerged in recent years (the Irish Primary Principals' Network, www.ippn.ie), it is not a trade union, and acts more as a support network towards the professionalization of leadership in schools.

Observations on Anne Marie's approach

As a young, highly-qualified teacher, Anne Marie is not a typical union activist. Yet, in the rural area where she teaches, the union provides one outlet for organizational skills and professional interests. Having recently completed a master's degree in education before moving to the rural location, Anne Marie is probably more familiar with current debates in education than some of her colleagues. Given the diverse nature of the union's activities, not only in collective bargaining but also in broader aspects of personal and professional development, the union attracts young professionals and provides a forum for exchange of views on significant matters of national policy. It is unlikely that a union focused on typical trade-union matters alone would be found to be of relevance in a profession that is predominantly female. On the other hand, a focus on professional matters without raising awareness of other union issues that impact more broadly on society would be less likely to develop the type of leadership qualities that Anne Marie is beginning to demonstrate. In order to successfully communicate its message and the range of its activity, the union needs professionals such as Anne Marie, who have excellent organizing skills, good time-management, and an ability to communicate clearly, effectively, and efficiently with their colleagues. In turn, the union provides a forum for teacher development as leader, both personally and professionally.

USA—New York

Unlike other countries, the United States does not have a national curriculum or set of teaching practices. Instead, these guiding principles are established at the state and local levels. Recently however, the federal government has taken a more assertive role with the passage of the No Child Left Behind Act of 2001 (US Department of Education). This legislation sought to improve US K-12 education by increasing the standards of accountability for states, school districts, and schools, while at the same time providing parents more choice in selecting schools their children could attend. The Act requires states to develop and implement assessments in reading and mathematics for all students in grades 3–8, and at least once during high school, in order to receive federal funding. However, the efficacy of NCLB is greatly contested by politicians, school administrators, parents, teachers, and communities throughout the country. While critics assert that the law has resulted in states lowering achievement benchmarks and encouraging teachers to “teach to the texts,” supporters argue that the increased accountability has contributed to a smaller difference in achievement between minority and white students. Through school report cards, NCLB provides parents and the community with annual performance data which is used to compare schools with each other and to themselves overtime. Should schools fail to make adequate progress, students are provided with additional resources and school choice. Furthermore, punitive measures are also imposed on the school for repeated failure, including the withholding of funds and closing of schools resulting in the reassignment of teachers and administrators. Funding for the implementation of NCLB has fallen short of expectations, as evidenced by sharp criticism by politicians and stake holders.

With the disparity in state and local curriculum and teaching practices, it is important to understand the New York City Department of Education initiatives and governance in which Jeffrey, the subject of the American school, serves as a teacher and building-level union leader. With Michael Bloomberg obtaining mayoral control of the schools, he initiated, along with the School Chancellor Joel Klein, The Children First Program, which in 2003 transformed the New York City School System. The Children First Reforms sought to change the leadership, empowerment, and accountability of schools so that strong principals are empowered to make decisions, including hiring and assignment of teachers to non-teaching assignments, and are held accountable for the results. Another consequence of the Children First Initiative was the establishment of a single reading and math curriculum and teaching practice for reading and mathematics. The Chancellor also instituted the Leadership Academy to recruit and prepare new school administrators in a shortened period of training. Many of the graduates of the Leadership Academy work in the city schools with the most high-needs populations. Furthermore, the time steps necessary to investigate and decide discipline and grievance charges against teachers were shortened. Building principals were further empowered with the piloting of “autonomy zones” in 2004. By agreeing to meet higher benchmarks, principals were given additional control over their programs, staff, and budgets. However, if the schools did not reach their target goals, the building principals would be held accountable with consequences including removal from the leadership position. During the 2007–08 school year, all city schools were given choices in the type of support they could receive: Empowerment Support Organization, Learning Support Organization, or Partnership Support Organization.

The teacher leader

Jeffrey Piekarsky is the elected United Federation of Teachers (UFT) Chapter Leader for a high school in the Bronx, NY. He is also a delegate to the state and national governing boards. Jeffrey

perceives his role as a liaison between the school administrators and the teachers, to ensure that the UFT contract is not being violated.

The teacher union “critical friend”

Barbara Signer is a Professor in the School of Education at St. John’s University, New York, USA, where she teaches graduate courses in instructional technology and mathematics education. Barbara has been awarded several federally-funded grants to research and enhance technology professional development of in-service teachers using her model of online learning with private-school teachers throughout New York City. Also funded were Bell Atlantic and AT&T Excellence in Education grants, serving students and teachers in New York City in the creation of inquiry-based multimedia projects. Barbara has been a classroom teacher of mathematics at the secondary and middle school levels. She has been a volunteer at a teacher centre in Israel, where she conducted workshops on teaching mathematics in Jerusalem and at schools throughout the country. She is the author of Math Doctor, MD, a diagnostic mathematics computer program used in New York City and Boston Public Schools.

Jeffrey’s views of leadership

Leadership styles and strengths vary among the school chapter leaders, depending on the size of the school (number of staff members), and personalities and inter-personal skills of the union leader as well as those of the school principal. Therefore, we cannot attribute Jeffrey’s leadership style to other school union leaders. Jeffrey is pro-active, meeting with his principal twice a day on union-related issues. He does not wait for teachers to come to him with issues that need to be resolved. Being the chapter leader of a small school (60 staff members) and having minimal family responsibilities has enabled Jeffrey to be more involved with his teachers and principal than other union representatives.

Jeffrey attributes his success to his ability to negotiate with his principal on behalf of teachers who may have been perceived as doing or saying something inappropriate. In these situations he has often been able to make a deal with his principal to ensure that the teacher does not get a formal letter of reprimand placed in his/her personnel file—which follows the teacher throughout their career in the New York City Department of Education.

Jeffrey has been encouraged to expand his UFT role to the state and national levels by district UFT leaders. They have acknowledged his successful skills and performance as a building union leader and recommended him to higher-level committees and training workshops, and assigned him to work on union projects.

Jeffrey expressed that his biggest challenge has been to maintain a positive working relationship with his building administrators, so that his teachers are not treated harshly. Some teachers perceive this to mean that Jeffrey is in partnership with the school administrators for his own gain. Interestingly, they are the ones who are quick to express how fortunate it is for Jeffrey to have such a positive relationship with the principal if they need his help. Jeffrey is very careful not to accept any perks that are awarded to teachers for fear that the teachers would resent him and his leadership.

Jeffrey’s positive relationship with his principal is furthered by his willingness to seek answers to questions that his principal would have a difficult time obtaining. Jeffrey also acts as a facilitator for his principal, asking teachers to implement a change in teaching or behaviour that they would resent hearing from the principal.

Observations on Jeffrey’s approach

It is not surprising to learn how the relationship between the school union leaders and building principals is crucial to being a successful chapter leader. With the NCLB emphasis on accountability by states, school districts, and schools, and the NYCDOE increased empowerment and liability of principals being tied to student achievement, principals are more demanding of teachers planning, teaching, and non-instructional duties. These demands, if unchecked, escalate into teacher dissatisfaction, grievances, and ultimately turn-over. By creating a constructive working relationship with the principal, chapter leaders such as Jeffrey provide a means for channelling what could be a potential clash into working compromise to the benefit of the teachers and the principals.

England

The teacher leader

Andy Reeve is a full-time lay officer for the National Union of Teachers (NUT). He is a local Association Branch Secretary for the Leicestershire Association, one of the largest associations in the NUT—approximately 3,000 members. Andy has only taken on this role from the start of the academic year (September 2008). Prior to that he had been an Assistant Secretary, with much less facilities time (employer-provided time off to fulfill union duties), and for much of his teaching career (24 years) he had been a “school rep”—a largely informal role which can vary enormously depending on post holder. Some reps act as no more than posters of union mail to members’ pigeon holes, whilst others take on quite significant and complex bargaining roles with headteachers.

The teacher union “critical friend”

Howard Stevenson is Deputy Director of the Centre for Educational Research and Development at the University of Lincoln. His research interests lie in understanding the formation and development of education policy processes, educational leadership, school sector labour relations/teacher unions, and the investigation of teachers’ work through labour process analysis.

Andy’s initial involvement in trade union activities

Andy described some of the influences that directed him towards union work and involvement. His upbringing in a Yorkshire mining village was cited as a significant influence, as was the radicalizing experience of higher education and the political literature he was exposed to through his studies. Andy therefore had well-formed political views before he entered teaching, and these views pointed logically to union involvement in some form. Another feature that came through strongly in the interview was Andy’s passionate support for teachers and public education, and a recognition of the need to support and value teachers in state (public) schools. These convictions required Andy to be active in some form of advocacy role.

Within his early teaching career, Andy’s motivations were channelled by a local union officer who acted as a mentor to Andy—encouraging his involvement in the union, but in a way that Andy found supportive and helpful, not off-putting. Andy recognizes the importance of this leadership role, and sees himself now trying to encourage it in others. Perhaps ironically, Andy was also encouraged in his union role by his headteacher. His headteacher was himself a union officer (for one of the headteacher unions) and he encouraged Andy to take on an active role, not only encouraging Andy to present union views in the school, but making it easy for Andy to attend union meetings during school time.

Andy's views on leadership

We discussed in the interview that this experience is now much less common. What Andy described was a situation where collective bargaining was much more embedded in the culture of teachers' work. This is much less the case now. The key turning point was identified as 1988, when England and Wales embraced an aggressive form of site-based management, in which headteachers assumed much greater responsibility, for example, for hiring and firing staff. This began to increase tensions between headteachers and their staff, and made "cordial" relations with unions more difficult. Conflicts were played out at the workplace much more (rather than at local authority (District) level), and this brought headteachers into conflict with union reps on a more-frequent basis. Since 1988, the emphasis on performance and accountability, especially under New Labour since 1997, has potentially increased these tensions still further. Andy observed that this has created a climate much less favourable to taking on union roles and activity. Not only are conflicts potentially more frequent, but teachers themselves need to be more pre-occupied with achieving targets, leaving less room for union activity. The performativity culture that is very well-established in English schools exerts significant pressures to both perform (in terms of achieving targets in student standardized tests) and conform (in terms of subscribing to state-endorsed models of school improvement).

Andy expressed some discomfort at discussing himself, and his role, as one of leadership. This highlights the cultural differences that are implied by the term. "Leadership" is not a term teachers in England are automatically comfortable with, and in a union context the term is somewhat pejorative, and is almost used as a term of abuse! Nevertheless, there was a wide-ranging discussion of what Andy did in his role, and how this might represent some manifestation or development of "leadership".

A feature of the discussion was the tremendously-varied nature of Andy's role—from organizing meetings, to high-level negotiating, to counselling a distressed member over the phone. Andy rejected the notion of a hierarchy of complexity, with his role developing as he assumed greater seniority in the union. He made the point that some "high-level" activities (attendance at formal senior meetings) can be very mundane, whilst some "low-level" activities (informal meetings with members) can be very complex and require sophisticated skills.

Andy identified a range of skills he felt he had developed over a long period of time, and that were generally distinct from those he expected to draw on as a teacher. He placed considerable emphasis on "facilitating"—helping others to make things happen. This was not only desirable in itself, but essential—in a site-based management environment there are simply not enough local union officers to cover all schools adequately—school-based union representation had to be developed. Andy therefore identified developing others' confidence as critical—but he highlighted how his own confidence had grown as he amassed both more knowledge and more experience. Andy reflected, however, that his role remains quite solitary, and the opportunities for him and others like him to learn from each other are limited.

Some discussion took place about the distinction between authority and influence in terms of how power is conceptualized. Andy indicated that as a school rep he had little formal authority, but was able to exert significant influence—largely by mobilizing resources he had at his disposal—knowledge, contacts, union strength in the school. However, as he took on a more senior role, he recognized his increasing authority—his ability to assert power, simply by being the NUT local official. Andy saw his role as a combination of authority and influence. He still relied on influence heavily—often with his own members. For example, in a multi-union environment it is not possible to easily invoke authority with members, as members may migrate

to other unions. Much more emphasis needs to be placed on winning support, and invoking authority only where appropriate. This tension was reflected in a discussion about Andy's perception of his role as "leader" versus "representative". Andy argued that there are many cases where his personal views are politically more progressive than those of most members. He has a role, therefore, in trying to win member support for these positions—to literally change hearts and minds. However, he recognized that this was difficult and not always successful—at which point judgments needed to be made about how best to move forward. This could involve delicate decisions about how best to reconcile competing positions. What helped Andy make these calls were his own personal values and convictions, which helped him navigate through the dilemmas he faced. However, this required him to know when to make compromises, and juggling these competing demands was an almost ever-present issue for him in his current role.

Observations on Andy's approach

The discussion revealed a complex role, in which a diverse range of skills are required. Whilst these skills can be "developed" in a technical way, it was also very clear that the application of these skills is grounded in a context in which values are central—and it is "union values", whatever they may be, which provide the specific context for discussing leadership in a union context.

Reflections on the three teacher leaders

These teacher leaders are acting in more traditional union activities than the professionally-focused participants that we considered in the first phase of the study, although Anne Marie's work in Ireland combines both professional and industrial areas of focus. Yet in many ways their approaches share many characteristics—but in particular service to others as colleagues, professionals and workers. During the interviews they all expressed some surprise and, occasionally, discomfort, with the title of "leader". Yet each clearly demonstrated and articulated qualities of and approaches to leadership in their work within their union and in their schools.

This research as a catalyst

One interesting development has been the growth of interest in teacher leadership with some spin-offs. We believe that this has occurred, in part because this research existed and had a catalytic effect on stimulating thinking and discussion about teacher leadership in teacher unions.

In terms of this research acting as a catalyst, three areas are considered here:

- 1. Increased international networking and dialogue**

The international foundation of this project has been a constant, but its expansion in this second year has also increased the range of networking and dialogue to include England, the USA, and the Republic of Ireland. In addition to this expansion there have been other informal yet important contacts with academics who have an interest in this issue and focus through conference attendance (e.g., International Conference on School Effectiveness and Improvement (ICSEI), Vancouver, January 2009;)

- 2. The development of a master's program in teacher leadership with an explicit focus on teacher unions and non-profit organizations**

The BCTF, and one of its urban locals, has participated in the development of a master's program, the first of its kind in Canada to explicitly focus on leadership within teacher unions. Two of the courses in this new M.Ed. program (scheduled to

start in September 2009) will be taught by BCTF Research staff members Charlie Naylor and Larry Kuehn. For an outline of one course, please contact Charlie Naylor.

3. **Face-to-face international networking and seminar series on teacher leadership**

We hope that the first international face-to-face seminar will take place in 2010. The seminar series will have two goals:

- discussions between teacher union staff and teacher leaders to consider approaches and understanding
- formal and invitational seminars exploring key themes through presentations and publications.

Educational importance of the study

This study is important because it has demonstrated, firstly, that the search for the school leaders of tomorrow must be far-ranging and not aimed at what could be termed the “usual suspects”, i.e., those union members likely more visible and prominent within union organizations. By this we mean that leadership currently exists—through this study we have identified a new cadre of leaders and potential leaders within school contexts that have been minimally acknowledged to date by either the academic or practitioner communities. We would argue that by recognizing and building on the strengths of these teacher leaders, teacher unions will become stronger. It may be important to recognize these “mid-level” leaders in order to keep them active within unions—by failing to recognize talented leaders, unions might lose some capacity as school districts and others may recognize the emerging leadership and offer an alternative route through channels other than teacher unions.

Secondly, this project has proved to be innovative from a technological perspective. Linking teacher union leaders across continents has been made possible through the use of technology. But it is the extension of its use which has become important. Technology use has not been static—as the research evolved we have expanded our capacity in using E-Illuminate for conferencing purposes, viewing videos of interviews in real time between Europe and Canada. Similarly, the Wiki use and interface have become more sophisticated in terms of the content, and more widespread, with additional members of the research team accessing and using the project Wiki.

Thirdly, we can reasonably argue that our evidence will make a contribution to the literature in the field of distributed leadership, as the participants are showing examples of distributed leadership based on the professional focus of their activities.

Concluding observations

One cannot help but be struck by the modesty and self-effacing nature of the teacher leaders in both the first and second phases of this study. They work selflessly with minimal overt recognition for the leadership and service they offer to their peers in schools. Teacher unions may arguably be taking their contribution somewhat for granted. Indeed, one area worth follow-up from this study may be to interview the union officials and gauge their awareness of the extraordinary contributions made by the likes of Anne Marie in the Republic of Ireland, Jeffrey in New York, and Andy in England. They share very similar characteristics to the teachers in our first phase in Canada, Australia, and Scotland—all equally modest and self-effacing.

Yet in each leader there exists a drive for improving the learning of students and/or the work life of teachers. And it is this drive that propels them towards leadership. There is also evidence that they have a passion that initially attracts other teachers to work with them, but it is the finely-honed skills of facilitation, empathy, and system-knowledge that makes them leaders, and that sustains their leadership over time. Thus leadership appears to be a subtle mix of passion and skills, of system awareness as keen as any sailor's sense of direction, currents, and dangers. The "systems" knowledge of union and school district policies, politics, and structures is a knowledge common to the teacher leaders. To continue the maritime analogy, they know the reefs and the calmer waters, and they steer accordingly.

Yet there is also a sense of their leadership at some times being a lonely and somewhat thankless exercise, in part because of the lack of recognition, but also because there appear to be no spaces for collaborative reflection, for the sharing of experiences and ideas. This is also one area where teacher unions, with their extensive networks, might play an innovative and important role, by creating networks for leaders not only to reduce isolation but also to develop resources and professional development. In this small project we have learned much from six teacher leaders—why not connect them across nations and oceans to build international capacity for leadership in unions, and for union leaders to take leadership roles in school districts?

Each teacher leader has passion. Passion cannot be taught but it can be harnessed. Skills can be understood, extended, and shared. The future for building teacher union leadership might well include a search for passion in directions other than rhetoric and militancy. Both have their place, but this study is opening options for a new form of leadership within teacher unions—one less visible but possibly building a stronger base for teacher union leadership and participation. It could build a stronger union base because, by building and expanding leadership of the kind described in this study, it strengthens both grass roots and middle-level union activism. Grass roots members could see this kind of leadership as an explicit option in terms of professional or industrial work and directions. Those currently offering leadership might benefit from recognition, skill development, and networking with other teacher leaders, locally, nationally and internationally.

Teacher union leadership development need not be isolated from those developing educational leadership in other ways and in different organizations. Teacher unions in a number of countries have a higher intellectual capacity than in earlier times, with many members and staff taking graduate degrees, presenting at conferences, and writing on web sites and in academic journals. As the educational leadership discussion and literature evolves, teacher unions could and should join the discussions and contribute to the literature.

These are early and still very tentative days for understanding and developing teacher union leadership. Yet this research has evolved in its two years, and now is the time to reflect, and to consider the future for research and networks appropriate for building the teacher union leadership of the future.

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