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# Principals' Role in the Development of Middle School Teacher Leaders

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Walden University
2023

Abstract

Principals' Role in the Development of Middle School Teacher Leaders

by

Ruben Lubala Chiza

MS, University of Oklahoma, 2016

BS, Savannah State University, 2012

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Education

Walden University

May 2023

Abstract

School personnel across the United States are developing additional teacher leadership roles to improve professional learning and retain effective teachers. More information is needed concerning how middle school principals are guiding the development of teacher leaders in their schools. The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. Bass's conceptual framework of transformational leadership guided this research. Research questions were designed to explore how middle school principals in urban schools understood their roles in teacher leader development and the leadership strategies employed to guide the development of teacher leaders in their schools. Eight middle school principals from one urban district in the northeastern United States participated in semi structured interviews and provided archival documents from teacher leader training agendas and team meetings minutes. Participants had a minimum of 3 years' experience at their schools. Thematic analysis employing a priori, and open coding were used to analyze the data. Findings indicated that middle school principals used two approaches to guide and train the development of teacher leaders: (a) fostering a culture of leadership development that included collaboration and trust and (b) building the capacity of principals and teacher leaders by providing leadership tasks and experiences. Future research could expand the scope of the study to include the perspective of teacher leaders. Positive social change implications include improving urban middle schools by helping principals understand the need to develop and support teacher leaders, to enhance the retention of teachers, and to increase the professional community's effectiveness.

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Dedication

I dedicate this research study to my family for being so supportive throughout this doctoral process. First, a unique feeling of gratitude is given to my beautiful wife, Christelle Bakatukanda Chiza, whose words of encouragement, prayers, emotional support, and endless love have sustained me throughout this journey of completing my studies. Second, my children, Baraka & Nebazuri Chiza, for the joy you bring into my heart and for reminding me never to forget to take a break from writing when I needed to have some fun. You all have been my best cheerleaders! Third, to my parents Fabien Chiza & Anastasie Lubala, for the sacrifice of relocating the family to the United States for better education opportunities and instilling in me the value of education. To the memory of my father, who always believed in my abilities to earn a doctorate degree. And lastly, I dedicate this study to God, thank you for the guidance, strength, wisdom, power of mind, and skills needed to complete my research.

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Chapter 1: Introduction to the Study

The notion that principals are primarily responsible for providing leadership in schools is shifting due to the current expectations of their responsibilities as instructional leaders (Wenner & Campbell, 2017). In addition to mainly performing managerial roles, principals are expected to provide instructional guidance to develop teachers professionally and maintain the primary importance of student achievement (Peters et al., 2018). The pressure of accountability put on principals from state and the federal government has increased, specifically in urban school districts, where principals are challenged with improving low student achievement and other reform efforts despite systemic challenges and high staff turnover. As a result, urban school principals find themselves isolated and alone, believing that they are solely responsible for their school improvement (school principal, personal communication, February 2021). To support urban school principals, systemic leadership shifts are necessary to improve (Parrett & Budge, 2020). School leaders must learn how to build leadership capacity for all involved in education to reform schools effectively (Wieczorek & Lear, 2018).

Teachers as leaders and their roles within schools have become the focus of much research on improving schools (Tian et al., 2016). Wenner and Campbell (2017) indicated that positive change tends to occur with teacher leaders serving as the driving force of school improvement. Principals must establish and foster a culture necessary to distribute traditional leadership roles and empower the teacher to take on leadership roles in schools (Peters et al., 2018). The implication of teacher leadership can be realized not just in teachers taking ownership but also in cultivating learning environments that are

empowering. Nevertheless, Peters et al. note that minimal guiding and training the development of teacher leadership by principals prevents the school from functioning out of a shared vision of the beliefs and efforts of a committed group of teachers who have a sense of belonging and are valued as members of the school community.

Principals can play significant roles in supporting teacher leadership by fostering staff motivation and commitment while creating favorable working conditions to support reform implementation (Stein et al., 2016). Weiner and Woulfin (2018) concluded that the principals' role in supporting teacher leadership influenced their effectiveness in improving instruction. This qualitative study investigated how middle school principals are challenged to guide and train the development of teacher leaders in their schools. This is important because it allows teachers with leadership skills to take ownership and be invested in the school. This study offers school districts and middle school principals' recommendations to support and develop teacher leaders effectively in their schools. The study addresses the gap in understanding the middle school principal's role in developing teacher leaders.

In this chapter, the problem statement and the purpose of the study are presented to explore middle school principals' perspectives of their role in guiding and training the development of teacher leaders in urban schools. Additionally, two research questions guided this study on gathering data from semistructured interviews and archival data. Finally, in this chapter, the conceptual framework that grounds the study, the nature, definitions of key terms specific to this study, assumptions, limitations, and the study's significance are discussed.

**Background**

The concept of teacher leadership has reemerged in the educational arena over the last 3 decades. Barth (2001) defined teacher leadership as a driver of positive influence within the classroom and the school. At the same time, Lambert (2003) described teacher leadership as performing actions that allow teachers to develop the potential to lead in a trusting environment. However, Katzenmeyer and Moller (2009) categorized teacher leaders as those who can lead within and outside their classroom.

In most recent studies, teacher leadership has been defined as "the practices through which teachers- individually or collectively- influence colleagues, principals, policymakers, and other potential stakeholders to improve teaching and learning" (Eckert & Daughtrey, 2019, p. 3). Wenner and Campbell (2017) suggested five general themes used to define teacher leadership further. Teacher leaders should

- exercise influence within and beyond classroom walls,

- support professional learning in their schools,

- be involved in decision making,

- focus on student learning in their schools, and

- work toward the whole school and organizational change.

The Center for Comprehensive School Reform and Improvement (2005) also defined teacher leadership as a process where teachers influence their colleagues, principals, and other members of the school communities to improve teaching and learning practices in school. Teacher leaders step outside of the classroom to become subject experts; influence the educational culture, practice, and growth in the community;

and lead the teachers to meet the needs of students, school, and community (Mansor et al., 2018). Teacher leaders influence teacher attrition through the support given to other teachers. The support influences peer success by promoting and facilitating professional learning and collaboration while designing, implementing, and supporting school and district change efforts to improve peer and student success (Killion et al., 2016). Furthermore, teacher leaders influence other members of the school communities by serving as experts and mobilizers to improve practices (Visone, 2018).

Principals in the school setting are responsible for leadership and management, which include supervising, directing, influencing, and supporting the transformation of others to achieve a goal (Shillingstad & McGlamery, 2019). They provide a vision that others must follow. The principals and teachers lead that vision, with teacher leaders rallying the team. Therefore, middle schools with teacher leaders need principals who understand their role in guiding and training the development of teacher leaders in their schools.

A gap in the research literature about practice exists as little is known about how principals in urban middle schools guide and develop teacher leaders. Smylie and Eckert (2018) indicated that there is much research on how principals distribute power to teachers, but little research addresses the principals' role in guiding and training teacher leadership. Such conditions of the development of teacher leaders have not been extensively studied. The challenge for middle school principals is the gap in understanding the leadership strategies used to develop teacher leaders. While there is research on a different development model for teacher leaders, there is a minimal

understanding of the leadership strategies employed by principals to guide and train the development of teacher leaders in their schools.

The study was relevant because principals continue to encounter challenges when developing teacher leaders in their schools. A priority for principals may be developing teachers to serve as mentors, instructional coaches, and facilitators (Lumpkin, 2016). The influence of teacher leaders on school change is highly contingent on the actions and beliefs of school principals (Stein et al., 2016).

## Problem Statement

The problem addressed in this study is that middle school principals are challenged to guide and train teacher leaders in their schools. It was not known how middle school principals are guiding and training the development of their teacher leaders. The leadership of a large urban school district in the mid-Atlantic United States had issued a mandate for all middle school principals to develop teacher leaders. The mandate was one of the superintendent's priorities to reduce teacher attrition (District Strategic Plan, August 2019). Principals' support of teacher leaders is essential. The approval comes in many forms, depending on purposes and situations of development, from guiding and training to providing resources and cultivating supportive organizational contexts (Leithwood et al., 2017).

The district's strategic plan focused on retaining high-quality teachers and school leaders in multiple ways, including developing teacher leadership opportunities. However, the reality was that over the 6 years prior to completion of this study, 13% of teachers had left the district, surpassing the state-established target of less than 10% and

the national target of 9% (State Department of Education, 2017). In addition, while some schools have developed a uniform way of developing teacher leaders, middle school principals in this district did not have a specific framework for the training and guiding teacher leaders' leadership development (Instructional Director, personal communication, February 2020).

Although an essential role of the middle school principal is to serve as the instructional leader tasked with developing and coaching teachers, the increased need for guiding and training teacher leaders can be challenging. Some principals do not understand the leadership strategies needed to guide and train the development of teacher leaders whose mission is to carry out the vision and develop a team of teachers who effectively deliver instruction. Because of a unique set of demands on urban communities, middle school principals experience challenges identifying teacher leaders and developing them. Cooper et al. (2016) found that developing teacher leaders in urban schools was not stable due to conditions that are not established and solidified within schools. With urban school principals shifting priority to addressing new challenges, it is now more critical than ever that principals understand how to guide and train teacher leadership development in their schools (Harris & Mujis, 2004). The underlying issue that led to this study was the minimal teacher leadership development in urban middle schools. The gap in practice for middle school principals was the understanding of how to guide and train teacher leaders in their schools. Thus, the qualitative research made meaning of the principals' roles in developing teacher leaders through the participants.

**Purpose of the Study**

The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. The development of teacher leaders improves teacher effectiveness (Powers et al., 2016). To guide and train the development of teacher leaders, it is not enough to appoint a few teachers to head the department or be instructional coaches supporting their peers. Instead, this development should rely on the traditional human capital approach, cultivating the teachers' leadership skills (Berry, 2019). Mayes and Gethers (2018) stated that principals need transformational practices to serve as change agents in schools that most need school reform. However, it is uncertain whether urban middle school principals understand their role in developing teacher leaders. By acquiring a better understanding of the strategies used by middle school principals, urban school district leaders can gain insight into how they can better support principals in developing teacher leaders. Doing so may help facilitate a streamlined process of sustained change in the development of teacher leaders in middle schools.

The study used a constructive paradigm theoretical perspective. The constructivist method defines learning as to how people interact with the world to create experiences and draw upon the experiences to create new knowledge based on their prior experience and reality (Elkind, 2005).

The constructive paradigm also builds understanding of the phenomenon through the participants' truth and knowledge. In the interviews, the participants were asked to gather information, formulate ideas, and make decisions based on the cognitive structure.

This qualitative case study may help urban school districts and middle school principals understand their role in guiding and training the development of teacher leaders. Eight school principals were interviewed to understand their role in guiding and training the development of teacher leaders in their schools. The study may provide awareness that will enable middle school principals to develop teacher leaders who can support teachers in becoming more effective in the classroom.

## Research Questions

The research questions addressed in this study helped me address the problem statement exploring middle school principals' roles in guiding the development of teacher leaders in their schools. The following research questions guided this research:

Research Question 1 (RQ1): How do middle school principals perceive their roles and experience in guiding the development of teacher leaders in their schools?

Research Question 2 (RQ2): What practices do middle school principals identify in guiding and training teacher leaders in their schools?

## Conceptual Framework

The conceptual framework that supported this study was informed by elements in Bass's transformational leadership theory. Developed by Burns (1978), transformational leadership theory is a method by which leaders and followers help each other increase motivation to achieve desired outcomes (Miska & Mendenhall, 2018). Transformational leadership theory encompasses the leadership theories of interactional (Silins, 1994), transactional (Bass, 1990), instructional (Blase & Blase, 1999), and distributive leadership (Katzenmeyer & Moller, 2009). Although interactional, instructional,

transactional, and distributive leadership focus on processes, transformational leadership is all about relationships. Transformational leadership is well suited for this study because it helps principals empower teachers and gives them hope, optimism, and energy, forms a shared vision and mission, and ensures intellectual stimulation (Litz & Scott, 2017). Bass (1990) argued that transformational leaders are proactive, raise follower awareness for transcendent collective interest, and help followers achieve extraordinary goals.

This study was grounded in Bass's four domains that define transformational leadership, which include: (a) idealized influence, (b) inspirational motivation, (c) intellectual stimulation, and (d) individualized consideration (Baptiste, 2019). The first domain describes idealized influence as the principals acting as role models for high ethical behaviors to teacher leaders. The second domain of individualized inspirational motivation refers to principals who can articulate the vision and inspire teachers. The third, intellectual stimulation, is the ability for principals to support and develop teacher leaders' creativity. Last, individualized consideration refers to principals' prioritizing the needs and concerns of teachers. These four domains combine to describe leaders as transformational figures (McCleskey, 2014). The idea of these domains revolves around the leaders' capability to develop followers' capacity and motivate them to contribute to change in the organization (Reza, 2019). This study was grounded in Bass' transformational leadership theory, which inspires followers to "commit to a shared vision and goals for an organization . . . and developing followers' leadership capacity" (Berkovich, 2016 p.47), which is described more fully in Chapter 2.

**Nature of the Study**

The nature of this study was a qualitative case study research design, which was chosen to understand how middle school principals understand their roles in developing teacher leaders and to explore middle school principals' practices in guiding and training teacher leaders. A qualitative case study was used because it requires human beings' internal ideas, feelings, and motives to be explored (Taylor et al., 2016). Participants shared their knowledge about practices and strategies to develop middle-school teacher leaders founded on personal experiences and ideas. In qualitative research, the researcher is responsible for creating a space that allows participants to share their experiences without feeling intimated and accurately present their data (Ravitch & Carl, 2016).

For this study, the participants consisted of eight middle school principals who have served a minimum of 3 years at the same conventional middle school and in the same capacity as the building principal. Data were collected through semistructured recorded interviews with open-ended questions and the collection of archival data from the teacher leaders' training or meetings from the study participants' schools. The interview questions explained middle school principals' perspectives and explored what leadership practices urban middle school principals employed to develop teacher leadership in their schools. The coding process first occurred by beginning with inductive coding of interview data reflective of the four domains of transformational leadership theory. Then, a thematic analysis was used to develop themes that answered the research questions (Ravitch & Carl, 2016).

**Definitions**

For this study, the following terms were defined:

*Middle School:* Schools serving students from any range of grades four through eighth grades (Manning & Bucher, 2012). This study only included school personnel serving middle school students in Grades 6 through 8.

*Teacher Leader*: This term applies to teachers who have taken on leadership roles and additional professional responsibilities (Hunzicker, 2017). For this study, a teacher leader is defined as a classroom teacher who positively influences others by taking on additional roles outside the classroom, either formally or informally.

*Teacher Leader Model Standards:* TLMS serves as guiding practices for effective teacher leadership and provides strategies for leadership opportunities (Coquyt & Creasman, 2016).

*Urban schools*: Urban schools are generally located in highly populated areas, cities with at least 50,000. They are often characterized by their location in segregated neighborhoods, physical decline, teaching staff with high turnover rates, and students with fragile family structures (Schaffer et al., 2018).

**Assumptions**

There were multiple assumptions within this qualitative study. The first assumption was that urban middle school principals participating in this study answered the interview questions honestly about their experiences guiding and training the development of teacher leaders in their schools. Another assumption presented in this study was that middle school principals shared similar strategies of guiding and training

the leadership development of teacher leaders during the interview process. These

assumptions were made because the open-ended questions were structured to allow

middle school principals to reflect on their roles and their leadership strategies to develop

teacher leaders.

## Scope and Delimitations

The scope of this study included eight middle school principals in an urban school

district in a Northeastern state. This study was delimited in two ways. First, middle

school principals with less than 3 years of experience at the same school were not

included in the study, as the principals were new to the role of serving middle schools.

Additionally, they also may not have been familiar with the district mandates nor had

experience developing a teacher leadership program. Second, this study was not designed

to investigate the leadership strategies of principals in nontraditional middle school

settings such as but not limited to school encompassing the specific configuration of

Grades K-8, 6 & 7, or 5-8.

This study was focused on understanding what middle school principals are doing

to guide and train teacher leaders in urban schools. Research questions of the case study

looked at the development model and support strategies school principals had

implemented and how those leadership actions developed teacher leaders. The study

occurred in an urban school district with a wide range of student achievement.

Further, I did not use Bruner's constructivism framework, where the participant

constructs the information by connecting prior knowledge to new information to create

subjective reasoning (Nguyen et al., 2020). This framework would have suited the study focused on teacher leaders' learning.

The hope was that this study's information would be informative for all middle school principals to use the findings to build teacher leaders' capacity in their schools. Ravitch and Carl (2016) defined transferability as the level at which qualitative study results are suitable to other settings or samples. I maintained clear research protocols and qualitative procedures throughout the study, allowing other researchers to study similar phenomena in different situations. In addition, to provide a rich participant group, transferability was addressed by purposeful yet random sampling of the middle school principals among the population of principals in the research district. Last, the inductive approach was used to allow for the transmission of parts of the study into different contextual factors (Ravitch & Carl, 2016). Transferability is the responsibility of both the author and the reader. For the reader to transfer the findings, the author must present a clear description of the study's population, phenomenon, and context.

## Limitations

Limitations are usually related to the approach, the design of the study, potential weaknesses, and aspects over which a researcher has no control (Dusick, 2015). The qualitative case study was limited by the number of participants. Creswell and Creswell (2018) recommended including 5-25 participants, and I obtained eight, although I hoped for more. It was not easy to have full cooperation with busy principals throughout the study. To mitigate this, I remained in constant communication with the principals and made it clear that they had an option to opt-out at any point of the study. Finally, because

of the global pandemic, access to participants was limited to the telephone or a virtual

setting such as Zoom, Google Meet, or Microsoft Teams. Data collection procedures

were implemented as described in Walden's EdD Administrator (AEAL) manual in

collaboration with the established site partnership. Ethical considerations were made to

protect the rights of all participants.

**Significance**

This study was significant because it addressed the gap in knowledge of how

middle school principals are supporting the development of teacher leaders in their

schools. The substantial increase in the emphasis placed on teacher leadership in the past

decade requires a deeper understanding of the conditions needed to support teacher

leaders (Creswell & Creswell, 2018). The principals' perspective is unclear in current

literature about teacher leadership development. Instead of only focusing on the

definition of teacher leadership, the "what" and "what is" of teacher leadership as found

in previous research, this study gathered specific information on the "how" to develop

teacher leaders and focus on practices used by middle school principals.

Positive social change may result from middle school principals clearly

understanding developing teacher leaders supporting the district to retain teachers. Urban

school district personnel looking to support principals in developing teacher leaders in

their schools could replicate the study participants' practices. Identifying principals'

practices may influence how middle school principals across school districts develop and

equip teacher leaders with an understanding of the phenomenon. Developed teacher

leaders may create new investment and a sense of understanding of how to be agents of

change in the educational field. Ultimately, this study may encourage the creation and improvements of teacher leadership programs, either in schools or districts.

## Summary

Developing teacher leaders is necessary for school improvement because today's teachers are responsible for educating the students and are expected to serve as role models for their colleagues (Mansor et al., 2018). Principals play a significant role in creating a school environment that allows teacher leaders to do their work (Wenner & Campbell, 2017). The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools.

The qualitative case study research method paired with Bass's transformational theory and constructivism research paradigm was used to explore middle school principals' perspectives of developing teacher leaders and the practices used to guide and train the development of teacher leaders in their schools. Researchers have studied the importance of teacher leadership and the perspective of teachers concerning that role, and more research was needed to understand the school principals' perspectives and their leadership practices in the guiding the development of teacher leaders. Urban school district leadership personnel could use this framework to replicate conditions that effectively develop and support teacher leaders, eventually improving student achievement and retention. Chapter 2 provides an overview of the literature and a detailed explanation of the conceptual framework supporting the research of school principals' roles in developing teacher leaders.

Chapter 2: Literature Review

The problem addressed was that middle school principals were challenged to guide and train teacher leaders in their schools. In this qualitative study, I explored middle school principals' perceptions on developing teacher leaders and the leadership practices used to guide and train teacher leaders in their schools. Chapter 2 consists of a review of current, relevant research related to principals' developing teacher leaders.

Current literature about the problem highlights that schools are aware of the limitations of the existing top-down organizational structure. There must be a shift in principals' roles from a manager to a shared leadership approach (Barth, 2001). Prior researchers have focused on the importance of principals distributing leadership and empowering teachers to take on schools' leadership roles (Sinha & Hanuscin, 2017). While researchers have supported the need for principals to develop teacher leaders, there has been little to no research into middle principals' understanding of developing teacher leaders in their schools. Research supports the principals' role in developing teacher leadership as the heart of school improvement (Szeto & Cheng, 2018). Furthermore, principals must have a thorough understanding of research and best practices and build capacity with teacher leaders to provide ideal learning opportunities for students (Johnson, 2019). This study is critical because there is a need for middle school principals to develop teacher leaders by creating a conducive environment within schools for teachers to serve as teacher leaders (Sinha & Hanuscin, 2017).

This chapter describes the literature search strategies used, a comprehensive review of this study's conceptual framework, and a literature review related to the key

concepts in the study. The literature review includes teacher leadership definitions and selection and certification, teacher leaders' role, teacher leadership development, teacher leaders' positive influence, and factors that influence teacher leaders. The summary provides a discussion of themes and gaps found.

## Literature Search Strategy

For this literature review, the primary resources used to retrieve articles were Walden University Library and Google Scholar. ERIC, Google Scholar, SAGE Journals, and ProQuest were the leading search engines used. I focused on search terms *teacher leadership, leadership development, teacher leader model, middle school principals, urban schools, transformational leadership, distributive leadership,* and *role of principals.* The search focused on peer-reviewed publications published within the 5 years prior to writing this review, except for theoretical and methodology texts and academics' seminal work in transformational leadership and the history of teacher leadership. I reviewed and used books on teacher leadership and qualitative research. I also conducted chain searches for authors referenced in related research articles and recent dissertations published within the 5years prior to writing this review.

## Conceptual Framework

The conceptual framework for this study was transformational leadership theory, which is derived from Burn's conceptualization of transforming leadership (Allix, 2000) and is currently the dominant paradigm in educational leadership theory (Hoch et al., 2018). Transformational leadership moves followers beyond their self-interests for the group's sound, organization, or society by a transformational leader (Fernandes, 2018).

The theory was developed by Bass (1990) and was initially used with political leaders to describe the ideal situation between leaders and followers. The theory was later developed in education by Leithwood (2016), who found that transformational leadership styles in school settings were best suited for coping with the demands of schools in the 21st century because they influence the school principals' ability to facilitate change within the school. Berkovich (2016) recently examined the current status of the transformational leadership theory in educational administration and found a need for more research. For this study, transformational leadership was displayed when teacher leaders perform beyond expectation due to self-determination, positive exchanges, and encouragement between them and the principals (Liu, 2020).

Bass (1990) identified four transformational leadership elements: idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration. The development of teacher leaders are guided and trained when school principals (a) display *idealized influence* by showing the willingness to take the risk; (b) provide *inspirational motivation* by inspiring confidence and have an understanding of where their teacher leaders are to adjust their leadership; (c) enhance *intellectual stimulation* by involving teacher leaders in decision making and challenging all to explore options and shared purpose; and (d) express i*ndividualized consideration* by understanding each teacher leader weaknesses and needs (Fernandes, 2018). Principals are called to demonstrate direct and active leadership through these elements. If employed with a transformational leadership lens, it helps develop teacher leaders essential to classrooms and school improvement overall (Jovanovica & Ciricb, 2016).

Furthermore, Underwood (2015) believed that principals who display transformational

leadership are successful leaders.

Central to this study were the specific leadership practices middle school

principals used to guide the development of teacher leaders in their schools.

Transformational leadership theory was selected for this study because principals' role as

transformational leaders ensures that teacher leaders are being developed (Anderson,

2017). There was a belief that when middle school principals employed leadership

practices grounded in the four elements of transformational leadership theory, there can

be effective teacher leadership development. Specifically, this study benefited from the

transformational leadership conceptual framework because this research aimed to

investigate the practices middle school principals used to guide and train the development

of teacher leaders.

## Literature Review Related to Key Concepts

### Teacher Leadership Definitions and Characteristics

Principals are tasked with many roles and responsibilities as demands in schools are

increasing. As a result, there is a need more than ever to reform the education system.

part of this reform is the principals' role in promoting the success of all students by

facilitating the development of teacher leaders. Specifically, to this study, improving the

quality of teaching and learning in urban schools has been a persistent issue that many

argue requires increasing instructional capacities and relying on teachers with formal

"teacher leadership" in schools (Cooper et al., 2016). Teacher leadership has been

asserted, but no single definition has been commonly accepted (Shillingstad &

McGlamery, 2019). The concept of teacher leadership originated from Bahn in 1947 as a tool for education reform launched during the 1980s and further studied in the 1990s (Kurt, 2016). In its first phase, teacher leadership was geared toward managerial and logistical tasks. The second phase features prioritizing the need for instructional leadership. The third phase includes increased collaboration with the belief that all teachers can grow professionally and influence change.

York-Barr and Duke (2004) defined *teacher leadership* as the process "by which teachers, individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching" (p. 258) and learning practices with the aim of increased student learning and achievement. Specifically, they suggested that teacher leaders importantly hold a crucial position in the ways schools operate and in essential functions of teaching and learning (York-Barr & Duke, 2004). Harris and Mujis (2004) framed teacher leadership as an agency that empowers teachers to lead improvement work with their colleagues and establish high expectations for their colleagues (Greenlee, 2007). Fairman and Mackenzie (2014) further posited that teacher leadership is not about positions or set of roles; instead, it is all about the need of the school that emerges from a clear vision.

Teacher leadership was initially based on the distribution of leadership theory in education (Nerlino, 2020). According to Barth (2001), principals realize that there are some limitations when working in isolation. Teachers are more likely to be invested in school improvement when empowered with a sense of responsibility. York-Barr and Duke (2004) suggested that teacher leaders and principals can collectively spread

decision-making power. The principals take ownership of the vision and resource alignment while the teacher leaders focus on instructional practice. The shift away from the traditional power structure comes from the need to meet the changing demands and growing expectations for school principals to display dynamic and flexible leadership (Harris & Spillane, 2008). Most importantly, researchers have found that principals do not lose influence in schools where leadership is effectively distributed; instead, they build a team where others can also gain influence (Ravitch & Carl, 2016).

Wenner and Campbell (2017) expanded upon defining teacher leadership and determined that the concept has not been clearly or consistently defined. However, they noted that the definitions based on previous literature and studies shared five common themes.

1. Teacher leadership goes beyond the classroom walls.

2. Teacher leaders should support professional learning in their schools.

3. Teacher leaders should be involved in policy and decision-making at some level.

4. The ultimate goal of teacher leadership is to improve student learning and success.

5. Teacher leaders work toward improvement and change for the whole school organization.

For this study's purpose, Wenner and Campbell's (2017) fifth determined theme will be used as it aligns with the principals' role in guiding and training the development of teacher leaders in their schools as a district mandate to school improvement.

**Teacher Leadership Models**

In addition to the variety of teacher leadership definitions used over time, models are used to categorize teacher leaders' roles and development. However, there has yet to be a particular model of teacher leadership that can be considered the ultimate model (Ab Rahim et al., 2020). The study will focus on comparing three teacher leadership models: Teacher Leader Model Standards, Teacher Leadership Competencies, and Teacher Leadership Skills framework, as they are aligned with the purpose of the study.

*Teacher Leader Model Standards*

As part of the Teacher Leadership Exploratory Consortium of 2008, a group of scholars released the Teacher Leader Model Standards in 2011 to provide a more explicit purpose of teacher leaders with seven domains. These domains are supported with 37 identified functions of teacher leadership practices and served as the foundation for developing the Teacher Leader Model Standard (Bosso, 2017). They are as follows: fostering a collaborative culture to support educator development and student learning, accessing and using research to improve practice, promoting professional understanding for continuous improvement, facilitating improvements in instruction and student learning, promoting the use of assessments for school and district improvement, improving outreach and collaboration with families and community, and advocating for student learning and the profession (Cosenza, 2015).

*Center for Teaching Quality- Teacher Leadership Competencies (CTQ-TLC).* The Center for Teaching Quality published the Teacher Leadership Competencies, which included four main competency areas: overarching, instructional leadership, policy

leadership, and association leadership. The model identifies 20 domains of practice that support the development of teacher leaders' skill sets (Wieczorek & Lear, 2018). CTQ-TLC teacher leadership model shows how the definition of teacher leadership is still evolving (Wieczorek & Lear, 2018).

The framework called Teacher Leadership for Student Learning was developed in Lambert, 2003, this model has been used to build teacher leaders for the past 16 years and updated with additional domains introduced in 2018. Teacher Leadership Skills Framework found eight domains: (a) role model, (b) expert, (c) collaborative culture, (d) communication, (e) data-enriched, and (f) diversity. Smylie and Eckert (2018) noted that recent teacher leadership models have moved to clearly outline teacher leadership domains and domains/competencies to define effective teacher leadership practices.

**Roles of Teacher Leaders**

The role of teachers in school reform has become more prominent in empirical research, and much of this research has posited that teacher leaders are vital for successful school reform (Greenlee, 2007). Cooper et al., (2016) believed that teacher leaders' roles, what it is and how it is defined varies depending on the school context and the research.

Scholars have commonly identified teacher leadership roles as agents to lead school reform and bring about influence beyond the classroom (Cherkowski, 2018). Although teacher leaders' roles in schools have shifted from focusing on managerial tasks to creating positive change with academics, research suggests that the functions of teacher leaders have yet to be fully realized. For example, teachers are more likely to lead

their peers when it comes to sharing instructional strategies and grading than they are with decisions that will influence the whole school in both academic and non-academic ways (Ingersoll et al., 2018). Overall, literature and studies have shown that teacher leadership is practiced inside and outside of the classroom and in formal or informal positions with various roles and responsibilities.

Teacher Leadership's role can be formal, part-time classroom teaching and specific titles that indicate additional responsibilities, not in the class (Gordon et al., 2020). Teacher leaders may serve informal leadership roles such as department/grade chair, mentors, instructional lead teachers, or curriculum specialists (Shillingstad & McGlamery, 2019). In this section, I will describe the roles of the headteacher-department or grade level chair, and instructional coach/specialists.

### *Headteacher - Department Head or Grade-Level Chair*

The two most common formal teacher leadership roles are head of department or grade level chair (Igiri et al., 2019). These two go in conjunction because they represent either a grade band or a specific content. Department heads are primarily found in secondary (middle and high) schools where teachers are grouped by subject area. Secondary use subject-specific teachers while primary school subjects by one or more than one teacher. Grade level chairs are primarily found in primary schools, where teachers are grouped by grade level. In the role of grade-level chairs, teacher leaders tend to do more operational tasks while leading their grade level/band. Igiri et al. (2019) referred to the grade-level chair as an extension of the administrative team, the principal, or assistant principal. The department head's role is to provide instructional support to the

teachers, which requires the department head to have extensive content knowledge. Department heads bring different perspectives to school decisions, specifically to their subject areas, presenting their expertise and legitimacy among their peers (Igiri et al., 2019).

Several studies stress the importance of department heads and grade level chairs. Formal teacher leaders are essential because of the close relationships with their colleagues and the ability to bring about change or support on their level (Leithwood, 2016). However, Chu (2019) argued that headteachers do not spend most of their day fulfilling instructional leadership responsibilities. Supovitz (2018) found that this type of formal leadership was the most influential factor in determining the quality of teachers' participation in professional development.

### *Instructional Coach/Specialist*

Instructional coach/specialist is another type of formal teacher leader. Instructional coaches can support improvement in the development of the school, teachers' practice, and student performance (Kraft et al., 2018). According to Supovitz (2018)), an instructional specialist's role is to study research-based classroom strategies, identify the most appropriate instructional approach for the school, and share best practices based on findings with colleagues. In partnership with teachers, instructional specialists help plan effective teaching strategies to differentiate instruction and interventions (Tanner et al., 2017). Coaches positively impact teachers' professional practice with different areas of focus, including data, literacy, general instruction, or content expertise. Specifically, the primary support teachers with lesson planning,

examining student progress monitoring data, implementing new programs, observing

teaching with providing feedback, and co-teach lessons (Kane & Rosenquist, 2018).

Overly, instructional coaches can support student achievement by developing shared

understandings, modeling practices, and explicitly supporting key instructional areas for

improvement (Woulfin & Rigby, 2017). Teachers benefit from the modeling and

individualized support from the coaches' targeting of areas of improvement in teachers'

practice.

**Informal Teacher Leadership**

Teacher leadership roles can be informal when a teacher volunteers to improve

more significantly with unsigned responsibilities. For example, Shillingstad and

McGlamery (2019) suggested that teacher leadership roles may be demonstrated in

informal ways through coaching peers, participating in small groups and teams to

improve aspects of the school program or modeling best practices. In addition, principals

can create an environment that encourages teachers to take on an informal teacher

leadership role by being a mentor, a catalyst for change, or voluntarily sharing

professional resources with others (Leithwood, 2016). Overall, the literature points out

two categories of informal teacher leaders: mentor and resource provider.

*Mentor*

Teacher mentors serve in many capacities, including introducing new teachers to

school policies and procedures, improving instruction through modeling, providing

social-emotional support, and reducing isolation among other teachers (Hong, 2019).

Mentors do not serve as part of the administrative team as their roles tend to be more

informal. They are considered informal teacher leaders because they influenced other teachers, credited for their hands-on experience with their colleagues. Weimer (2020) posited that mentoring is a tremendous responsibility, and to effectively carry out the role, mentors must manage multiple demands. In addition to supporting their colleagues, teacher leaders serving as mentors also shape the workplace conditions that foster new teachers' success by proposing a new vision of teaching and learning for their schools (Anthony et al., 2019). In a sense, the role of the mentors is to do what is needed to support other teachers in a new environment.

Empirical research is needed to identify the resources necessary to support school principals to develop mentors and understand the learning needs of those classroom teachers asked to be mentors (Chu, 2019). Correctly identifying and selecting a mentor and providing initial preparation and ongoing development to support their growth and effectiveness is essential and should be a high priority for school principals (Weimer, 2020). Mentees' benefits include staying in the profession, improving teaching practices, and increasing student achievement (Ronfeldt & McQueen, 2017).

### *Resource Provider*

Teacher leaders serving in this informal role are known for providing educational resources and offering encouragement to peers. Gordon et al. (2020) conducted a study to seek the perceptions of teacher leaders who serve resource providers by surveying administrators, educational specialists teachers working in PK-12 schools across four states to understand the role and influence of resource providers. They found that teachers who take the role of resource providers share researched best practices and instructional

materials with their colleagues to foster collective teacher efficacy (Gordon et al., 2020).

Another characteristic found in resource providers is their resilience as they work to

move their practice and their colleagues (Cooper et al., 2016). As instructional coaches,

resource providers are transparent with instruction and build strong relationships with

peers, fostering trust and encouraging teachers to work collaboratively to improve

practices that will enhance student achievement (Hunzicker, 2017). They differ with the

resource provider, one serving as an informal role.

**Teacher Leadership Development**

Developing teacher leaders in school have become an essential phenomenon to

research in literature. While teacher leaders are called to do the leadership work of

developing individual teachers, teams, and schools towards school improvement, teachers

must be developed as leaders to be done effectively (Wenner & Campbell, 2017). Yet,

there is limited research on how teachers are developed into leaders. Huggins et al.

(2017) argued that the learning of teacher leaders needs to be approached as a

development process with school principals selecting those with leadership potential and

teachers reflecting on their identity to increase their leadership understanding. Teacher

leaders can be developed through professional development and job-embedded

collaboration tailored to build their capacity as leaders. Teacher leaders must be

developed because most of their leadership actions focus on professional development

activities, i.e., coaching, professional development workshops, mentoring, and such),

which requires them to have skills beyond being a classroom teacher (Gordon et al.,

2020). Teacher leaders have opportunities for structured leadership development

programs, such as those offered in their schools, districts, graduate school programs, and private groups (Cherkowski & Schnellert, 2018a). This section will review school and district-based teacher leadership programs and graduate school, private and nonprofit programs helpful in developing teacher leaders.

### *School-Based Programs*

Effective principals develop the capacity, opportunities, and support for teacher leadership in their schools (National Policy Board for Educational Administration, 2015). As part of building capacity, principals need to develop school-based formal professional development to cultivate teacher leaders' development (Huggins et al., 2017). Yow and Lotter (2016) believed that professional development and job-embedded collaboration between teachers and school principals is one way to develop teacher leaders. Professional learning opportunities for teacher leaders are usually around subject-specific or pedagogy to improve practice within their classrooms, rather than explicit training in supporting other teachers (Huggins et al., 2017). Job embedded collaboration supports emerging teacher leaders' opportunities for professional growth by having them actively engaged with a community of people who are developing their practices over time (Frick & Browne-Ferrigno, 2016).

There are various benefits for principals to prioritize creating school-based programs to guide and train the development of teacher leaders. Aldahmashi (2020) posited that school-based teacher leadership programs improve teacher leadership by equipping them with leadership skills, helping them understand different leadership styles, and preparing them for leadership roles. The guiding and training of teacher

leaders should by principals align with teacher leaders' leadership views, practices, and identity. Sinha and Hanuscin (2017) investigated leadership development pathways in different career stages as they participated in school-based professional development led by principals. In this leadership development model, principals had to create an environment for teacher leaders to practice leadership, exposure to a new perspective on leadership, and identify leadership role models through reflection, feedback, and recognition of each other.

Further research is needed to develop teacher leadership development programs suited for 21st-century learning and aligned to other leadership strategies such as instructional leadership (Ab Rahim et al., 2020). Gibson (2018) explored a school-based leadership preparation and development (LPD) within a multi-academy trust (MAT), using a case study to determine its effectiveness. The leadership preparation and development program were designed to equip emerging teacher leaders and build their capacity as they learned to adapt to responsibility and accountability (Gibson, 2018). It was found that quality assurance was needed if school-based academies were the primary provider of leadership development to teacher leaders, and school principals needed a specific framework to approach this development.

### *District-Based Programs*

School-based development programs alone are not enough to develop teacher leaders. District-based programs are initiatives from the district office, sometimes in partnership with schools, universities, or outside the organization, to develop teacher leadership in schools. Thus, there is limited research on district-based teacher leadership

programs. This section will explore the following programs: School Leader Teams (SLT), Teacher Leader Academy (TLA), and Teacher Leadership and Compensation (TLC).

School Leader Teams (SLT) program is a district initiative for leadership preparation for 74 schools (Cliffe et al., 2018). Cliffe et al. (2018) investigated the program to determine the effect of school and district partnership supporting the leadership development of teacher leaders. They found that models of leadership and development opportunities were available, but there was no way to transfer opportunity access from school to school (Cliffe et al., 2018). Teacher Leadership Academy (TLA) is another example of a district-based program focusing on teachers' professional growth as leaders. Teacher Leadership Academy (TLA) trains teachers selected by principals for a district initiative to enhance teacher leadership. Visone (2018) conducted a case study followed by interviews to compare those who participated in the academy and those who did to examine the effectiveness of TLA. The study's result found that teachers' confidence in their leadership abilities grew due to their participation in the academy; they discussed how their emotional intelligence increased, and untimely, they understood that relationship building was vital to their effectiveness (Visone, 2018). Eckert and Daughtrey (2019) also investigated a district-based leadership development program, Teacher Leadership, and Compensation (TLC), for its effectiveness in developing teacher leaders. However, they found that TLC was insufficient to meet the district mandate of developing teacher leaders. Instead, the principals and teacher leaders needed the opportunity to work together within their school as the base. District-based teacher

leadership development needs to grow into joint partnership and collaboration with the work taking place in the schoolhouse, with the principals playing a part in that process (Eckert, 2017, 2018).

### *Universities and Non-School Development Programs*

Despite state-level graduate enrollment decreasing, more teachers are enrolling in graduate school programs focusing on teacher leadership. Zugelder et al., (2018) conducted a study to investigate teacher leaders enrolled in the Master of Art in Education (MAEd) program to understand the perceived professional role for teacher leaders and how they are developed. The Master of Art in Education is an online program at a large public university, where students complete all coursework through distance education. The program offers specializations for nine teaching areas, and teacher leadership is on the contraction concentration (Zugelder et al., 2018). It was found that leadership programs outside of the school or district can develop teacher leaders specifically in finding their forte as leaders using roles and attributes that focus on their strengths and challenge them in areas of improvement (Zugelder et al., 2018).

Teacher leadership development has gained some traction in the United States and Europe. Literature has highlighted additional programs developed in recent days to guide and train the development of teacher leaders. England's National College for School Leadership is a program that focuses on preparing teachers for different types of leadership work. Also, micro-credentialing has become another pathway to becoming a teacher leader. In micro-credentialing, teacher leaders can complete a set of modules with

the focus to strengthen their instructional practice through the understanding and the application of the Standards for Professional Learning (Smylie & Eckert, 2018).

**Positive Influence of Teacher Leaders**

Teacher leaders have been acknowledged qualitatively and quantitatively as playing a pivotal role in student achievement (Cherkowski & Schnellert, 2018a). The influence over the professional work of other teachers and being part of making leadership decisions that impact the school beyond the classrooms are evidence of teacher leaders' impacts in schools (Agbajeola, 2019). Teacher leaders can directly impact their school community with teacher retention and building coherence and collaboration.

*Teacher Retention*

Teacher leaders can influence other teachers positively with retention by serving as mentors. Morettini (2016) reported that mentoring was a teacher retention strategy, which can be offered at the university level, during teachers' onboarding, and throughout the school year. Principals are encouraged to pair novice teachers with teacher leaders as mentors (Abitabile, 2020). Mentoring is even more needed for urban schools with many certified teachers (Zhang & Zeller, 2016). The benefit of teacher leaders mentoring in school is that they are better positioned to notice and nurture themselves and others. That may benefit growing a school culture that everyone feels supported (Wenner & Campbell, 2017). Cross and Thomas (2017) posited that a supportive, positive culture also does contribute to teacher retention. In addition, teachers flourish when they feel a sense of belonging to a team of colleagues working toward a common goal (Cherkowski,

2018). Therefore, schools are likely to retain a teacher when they feel job satisfaction (Abitabile, 2020).

### *Coherence/Collaboration*

Teacher leaders can have positive influences through fostering a culture of coherence and collaboration in their schools. Teacher leaders have the most significant influence on school norms, culture, and instructional processes (Taylor et al., 2018). They play a crucial role in supporting other teachers in professional learning communities. Teachers need collaborative opportunities to determine and resolve any classroom issues and barriers to improve student achievement. That can occur where there is coherence and collaboration among each other (Hall & Clapper, 2016). Coherence and cooperation are evident when (a) new learning is built on what teachers already know; (b) there is an alignment with national, state, and local standards, assessment, curriculum during professional development, and (c) the learning is aligned with the school improvement goals (Stosich et al., 2021).

According to empirical evidence, teacher leaders' influence on teaching practice may be limited to several main organizational and leadership practice areas, such as culture, communication, relationships, and collegiality (Wieczorek & Lear, 2018). Furthermore, Cherkowski and Schnellert (2018b) conducted a case study to understand how teachers cultivated a culture of professional development within the collaborative inquiry. In their findings, teachers did appreciate the opportunity to have ownership in creating their learning through inquiry and collaboration. They also shifted their thinking about leadership entirely by having a chance to take on a leadership role among their

peers. The sense of ownership to change the school's outcome increased (Cherkowski & Schnellert, 2018b). Most importantly to this study, school principals should guide and train the development of teacher leaders' practices to build coherence and collaboration that will improve teaching and learning in schools (Stosich et al., 2021). Ultimately, the primary reason for the increased need for teacher leadership is to improve the quality of instruction (Smith & Squires, 2016).

**Principals' Influence on Teacher Leaders**

Principals can influence the guidance and training of teacher leadership with the following: school culture, roles and relationships, and structure. Principals must foster a culture where teachers are allowed to take risks and step into leadership. This process can start with the process of recruiting teacher leaders. Coquyt and Creasman (2016) urged principals to take the recruiting process seriously, utilize effective strategies, and develop teachers into leaders. Principals have been found to directly influence teacher leaders in that teacher leaders can produce results when principals can empower teachers and delegate (Sinha & Hanuscin, 2017). Additionally, when principals develop teacher leaders, there is an influence on organizational processes, leading to student achievement (Sinha & Hanuscin, 2017).

As for roles and relationships, studies of teacher leadership have shown that shared leadership by principals is needed for school improvement. Principals must guide teachers in instructional matters and promote teacher leaders to reflect on their practice to translate into school progress (Pan, 2008). Similarly, when principals made room for teacher leaders' voices and were members of decision-making instead of just the leader,

those teacher leaders effectively drove school-wide change. Kane and Rosenquist (2018)

believed that the core belief shared among principals and teacher leaders, that

collaboratively sharing and distributing the leadership can improve teachers' growth.

Finally, principals should provide support by listening, sharing experiences, and

modeling, which generates a sense of common purpose (Kane & Rosenquist, 2018; Lear,

2017).

Principals can influence teacher leaders through systems and structures that

support their development programs. Parlar and Cansoy (2017) explored the effectiveness

of bureaucratic school structure and teacher leadership's school culture. They found that a

successful bureaucratic school structure created the principal, predicted a positive

environment where teacher leadership was developed (Parlar & Cansoy, 2017). As a

principal, Fiarman (2017) built teachers' support to lead their ongoing professional

development and learning through communities of practice implications for developing

teacher leaders (Frick & Browne-Ferrigno, 2016). Ultimately, the principal's role as the

school's instructional leader is to build an organizational climate that encourages and

supports leadership. With a school culture that empowers, fosters relationships, and

creates structures for leadership, teacher leaders can reach their potential with the

influence of principals guiding and training their development.

## Summary

The literature review focused on defining teacher leadership, its roles, the

development, and the positive influence from both the teacher leader and principal.

Principals who aspire to meet the challenge and demands of the education system should

understand how to train and guide the development of teacher leaders or have a mindset to gain the knowledge needed to do so. Principals play a highly influential role in the progression from teachers to teacher leaders (Hunzicker, 2017).

While many studies have been conducted exploring teacher leadership's development, there still is a minimal consensus about the definition and role of teacher leaders (Wenner & Campbell, 2017). The present study surrounding teacher leadership reveals a shift from the traditional leadership approach to distributive leadership. Moreover, principals need to develop teacher leaders to distribute responsibilities for student achievement (Fiarman, 2017). Research also emphasized that teacher leadership development must be prioritized and ongoing efforts (Frick & Browne-Ferrigno, 2016; Huggins et al., 2017; Visone, 2018). This research aims to add to the literature by exploring the strategies middle school principals use to respond to the district mandate of training and guiding teacher leaders' development and their schools.

In Chapter 3, the design and methodology guiding this qualitative study are discussed. The research approach to explore the leadership practices of middle school principals is identified in detail. The subsequent chapter describes the preparation for the research and the process for researching in a scientific, ethical manner to obtain data regarding middle school principals' understanding of their role and the phenomena. The resulting data can have positive implications for practical use and develop a common framework for teacher leaders. The following chapter consists of a detailed explanation of the research plan to provide data that gives rise to an existing gap in practice regarding the principals' role in developing teacher leadership in their schools.

Chapter 3: Research Method

The purpose of this qualitative case study was to explore the leadership practices used by middle school principals to develop and support teacher leaders in their schools. I was particularly interested in learning about the perceptions of middle school principals' role in guiding and training the development of teacher leaders. There is a growing recognition that teacher leaders play a critical role in schools' organizational capacity for instructional improvement and learning (Harris & Jones, 2019). Understanding the specific practices of middle school principals who are developing teacher leaders in their schools could offer insight to district leaders as to how to better support the work of middle school principals.

In this chapter, the research design for the qualitative case study is discussed in detail with its rationale. The researcher's role is clearly defined, discussing strategies to address ethical considerations, trustworthiness, and the validity of results. Additionally, the methodology, participant selection process, and instrumentation used to collect data is detailed. The conceptual framework of transformational leadership supported this study.

**Research Design and Rationale**

The research questions for this qualitative case study were focused on how middle school principals perceive their roles in developing teacher leaders and the practices used to guide and train them in their schools. The research questions that I sought to answer in this study were as follows:

RQ1: How do middle school principals perceive their roles and experience in guiding and training the development of teacher leaders in their schools?

RQ2: What practices do middle school principals identify in guiding and training teacher leaders in their schools?

The central phenomenon investigated in this study was how middle school principals in an urban school district perceived their role to develop teacher leaders in their schools and what practices were used to train and guide teacher leaders. Recent research shows growing studies demonstrating the need for teacher leaders and the principals' roles in developing and supporting them (Simons, 2020). However, establishing a common framework or structure to develop teacher leaders remains a struggle for middle school principals in urban districts.

Selecting a research method for a study is an important decision that requires reflecting upon the proposed problem, purpose, research questions, and data collection and analysis procedures (Rubin & Rubin, 2012). The central concepts of this study were teacher leadership and transformational leadership, which were appropriate for qualitative research methods. Qualitative research is based on the methodological pursuit of understanding how people see, view, approach, and experience the world and make meaning of their experience (Ravitch & Carl, 2016). Qualitative research further requires the researcher to select the appropriate qualitative field research paradigm for the study (Ravitch & Carl, 2016).

The research methodology for this study was a qualitative exploratory case study. The study was exploratory because I made explicit statements about the focus and extent of the research (see Creswell & Creswell, 2018). Qualitative research also relies on human experiences and understands how experiences shape everyday life (Ravitch &

Carl, 2016). Participants shared their perceived understanding of their role in developing teacher leaders and the practices used to guide and train teacher leaders in their schools founded on personal experiences and ideas. I approached the phenomenon from a constructivist stance, serving as the observer to record participants' responses and behaviors in their natural settings to understand a phenomenon within locally constructed realities (Denzin & Lincoln, 2011).

Other qualitative research designs (ethnography, phenomenology, and grounded theory) were investigated for consideration but were not chosen because they did not meet this study's needs. An ethnographic research method reports on social life that focuses on detailed and accurate description rather than explanation and describes and interprets a culture-sharing group (Babbie, 2017). This method also requires long-term immersion in the culture. It is unnecessary to identify middle school principals' strategies to support teacher leaders' development via ethnography because they can be collected (Creswell & Creswell, 2018). Phenomenology focuses on finding the collective meaning of several individuals' shared lived experiences about a particular phenomenon (Webb & Welsh, 2019). However, a phenomenological study was not appropriate because the research was not about the middle school principals' experiences developing teacher leaders; instead, the focus was on exploring middle school principals' perceptions on developing teacher leaders and the practices used to guide and train teacher leaders in their schools. Grounded theory aims to discover or construct theory from systematically obtained and analyzed data using comparative analysis (Chun Tie et al., 2019). The grounded theory is more about studying an action, interaction, or process using many

participants. (Babbie, 2017). Developing a theory was not the goal of this study; instead, the research goal was to describe the middle school principals' understanding of their role in training and how they guide the development of teacher leaders.

An exploratory qualitative case study was appropriate for my study because the study was about understanding how middle school leaders perceive their roles in developing teacher leaders. Additionally, the study sought to discover the leadership strategies principals used to guide the development of teacher leaders in their schools. I explored the phenomenon and answered the research questions. Interviews and archival documents were used to obtain the research data and gather participants' leadership practices through a targeted location studied in a qualitative exploratory approach (Merriam, 2001). Semistructured interviews were used to gain information about a specific topic. A limited number of prepared questions and potential follow-up questions will be used to collect the data. (Rubin & Rubin, 2012). The semistructured interviews was able to capture data aligned with the research questions on middle school principals' perceptions of their role in guiding and training the development of teacher leaders in their schools.

Archival meeting/training agendas also provided data on what leadership practices middle school principals employed to guide and train the development of teacher leaders in their schools. The boundary of this exploratory qualitative case study was middle school principals in an urban school district in the mid-Atlantic United States.

**Role of the Researcher**

As the researcher in this study, my role was an observer and data collector (Creswell & Creswell, 2018). Since the research setting was in my working school district, I collected data as an insider. The advantage of an insider is that the position allows the researcher to have insights that outsiders could not (Denzin & Lincoln, 2011). Merriam and Tisdell (2015) added that "observations offer a first-hand account of the situation under study and, when combined with interviewing and document analysis, allows for a holistic interpretation of the phenomenon being investigated" (p. 160). As the primary researcher, I was responsible for the study's design, creating the research instruments, and collecting, analyzing, and interpreting the collected data. Data will be collected and coded data using thematic analysis strategies to investigate interview responses from participants and archival documents.

While I am currently an assistant principal at a K-8 public charter school in the urban school district being studied, the school where I am employed was not a part of this research since it does not meet the criteria of being a conventional public middle school. Although I have a professional affiliation with most middle school administrators in the district, I had no personal relationship with any assigned to the schools in this research study. Furthermore, I had no authority over any individuals who lead conventional middle schools to participate in the study. While my K-8 school is in the same urban district, I did not collect any data from my principal. Moreover, I did not receive any personal or professional gain, or incentive from the results of this study. Participants were not compensated for their participation in this study.

The role of an assistant principal is the only professional role I have held in this school district. I oversaw supporting students and teachers in grades 6 through 8. The bias that I brought to the study is my current experience as a school administrator who supports middle school grades in a K-8 school. I have also guided and trained the development of teacher leaders in my school. Based on my knowledge, experiences, and beliefs as a middle-grade assistant principal in the district, I believe that 1) developing teachers into teacher leaders is one of the driving forces to sustain change in schools; and 2) there can be an increase in teacher ownership if principals understand their role in developing teacher leaders, as well as the practices, used to guide and train teacher leaders in their schools.

The interview questions were open-ended to address this bias throughout the study. By using open-ended questions, biases are addressed by allowing participants to offer opinions or facts that the researcher did not think about, providing rich, relevant data for the study (Allen, 2017). In addition, I used a peer reviewer as an additional measure to mitigate bias. If selected based on the methodological expertise, the peer reviewer can better critique the study, mitigating knowledge biases about the research topic (Powers Dirette, 2020). The peer-reviewed was a former colleague with experience in education and has a doctorate in philosophy in education leadership. He currently serves as a graduate and doctorate program professor in education.

Finally, as an insider, I remained objective and impartial as I collected data and as the participants shared their perceptions regardless of my knowledge of their work. I

ensured trustworthiness of the study by using validity strategies of peer reviewers and triangulation of data collection. I will further discuss the two strategies in this chapter.

## Methodology

The research methodology and design for this study is a qualitative exploratory case study. The qualitative approach relies on human experiences and understands how experiences shape everyday life (Ravitch & Carl, 2016). Merriam (2001) described how a qualitative approach is mainly concerned with understanding how individuals perceive and make meaning of their experiences. Qualitative research includes participants' beliefs, attitudes, and experiences, with experiences being what happens in a specific situation of the participant. In this study, the phenomena explored was middle school principals' perceived understandings of their roles in the development of teacher leaders and the specific practices used to guide and train teacher leaders in their schools. I addressed my biases by purposely selecting participating middle school principals and excluding principals with whom I had more than a professional relationship or direct affiliation with my charter school network, even if their school met the study's criteria.

### Participant Selection

The population for this study was 32 middle school principals of a large urban school district in the Northeastern United States. There are approximately 125 schools and 30 public middle schools in the school district where the research study was conducted. The school district is considered urban due to its location, diverse economic composition, and predominantly African American population. Principals who led public middle schools received an email invitation from me asking for participation in the study.

Those willing to participate were asked in the body of the email to reply with "I consent."

A purposive sample of eight principals who met the criteria were selected after consent

was received from participants.

Purposeful sampling allows for selecting individuals who have the expertise and

experience related to the phenomenon and are also able and willing to participate in the

study (Palinkas et al., 2015). Three criteria were used to identify principals serving

middle schools in urban schools. Measures included familiarity with the school district's

mandate to develop teacher leaders, current service in a conventional public middle

school with grades sixth through eight, and a minimum of 3 years of experience at the

same school. Eight middle school principals agreed and matched the desired conditions to

participate in the study. I used a sample size of eight middle school principals because the

size was large enough to ensure that the research questions were thoroughly answered

(Ravitch & Carl, 2016), and all the perceptions that might be important to study are

uncovered (Mason, 2010). Ultimately, the responses of the eight participants aided with

making important decisions (Ravitch & Carl, 2021) about middle school principals'

perceptions in training and guiding the development of teacher leaders in their schools.

**Instrumentation**

I used the exploratory qualitative case study to understand middle school

principals' perceptions on developing teacher leaders and the practices used to guide and

train teacher leaders in their schools. Two instruments, interview protocol and archival

documents were used. First, data were collected from one-on-one semistructured, open-

ended interviews with the interview protocol. The second source of data collection for

this study came from a review of meetings and training notes using an archival data protocol. The transformational theory, which frames this study, and related literature were used to develop the interview questions for the study. The researcher created the interview protocol as described (see Appendix A).

Archival document protocol was the second instrument used for this study to review teacher leader training agenda and leadership team meeting minutes (see Appendix B). The protocol was created based on the transformational leadership framework, the related literature, Walden's Institutional Review Board (IRB), and the school district's research officer. The training agendas and leadership meeting minutes addressed both RQs because the training objective/activities and meeting notes provided primary source data on how middle school principals perceive their role in developing teacher leaders and what specific leadership practices are used for training and guiding the development of teacher leaders.

### *Interview Protocol*

Qualitative interviews provide deep, rich, individualized, and contextualized data necessary in qualitative research, making it the foundation of data collection (Rubin & Rubin, 2012). Interviews have been an established means of qualitative study and have been used by many academics seeking to develop holistic descriptions of perspectives, realities, experiences, and phenomena (Creswell & Creswell, 2018). Semistructured interviews collected data from selected middle school principals in urban schools.

The interview questions were aligned with the research questions by creating an interview guide developed by Walden University (2016b) and used during the qualitative

reasoning course. Semistructured interviews was the type of questions crafted for this study. The open-ended questions allowed participants to reflect on how they perceive their role in developing teacher leaders and identify practices employed to guide and train the development of teacher leaders. The interview protocol was developed with intentionality ensuring that questions will answer the research questions. Current literature on Transformation Leadership theory from Burns (1978) and Bass (1990) and practices (Kouzes & Posner, 2013) guided the development of the interview questions. Formalized structured interviews would have not allowed for a complete understanding of principals' role in guiding and training the development of teacher leaders due to how rigid the interview is structured (Merriam & Tisdell, 2015). In addition, informal, unstructured interviews were also not appropriate for this study because they may have not led to common themes or findings (Merriam & Tisdell, 2015).

The interviews took place via Zoom, interviewing each participant in a one-on-one setting. The participants responded to four open-ended questions in order to ensure consistency. Each question had three to four probing and follow-up questions. The interviews were recorded and transcribed using the features on Zoom. I reviewed them for accuracy and analyzed them for themes related to answering the RQs.

### *Archival Data*

Archival data were collected from middle school principals' teacher leaders training agendas and leadership team meeting minutes of teacher leaders for the last 2 years to explore principals' perceptions of the role and identify leadership practices employed guide and train the development of teacher leaders. Archival data provides

context and history to help the researcher understand the complexities of the phenomenon studied (Ravitch & Carl, 2016). Yin (2016) posited that the advantage of using archival data is that the data collection adds to evidence from another source. It does not only rely on the participants to provide information for the study through interviews alone. The middle school principals provided electronic copies of their teacher leaders' training agendas and leadership team meeting minutes and training materials such as PowerPoint and activities. Training materials and meeting minutes will be reviewed from August 2019 through August 2020.

The analysis of the archival data indicated how middle school principals perceived their role in guiding and training the development of teacher leaders in their schools and understanding the practices used in the development of teacher leaders. Specifically, both archival data provided answers to the second research question. The notes explained how middle principals implement leadership practices in meetings to train and guide teacher leaders. These data were reviewed to categorize the middle school principals' actions to develop teacher leaders.

**Procedures for Recruitment, Participation, and Data Collection**

***Recruitment***

I began recruitment via email requesting a suitable time for the interview. A blind copy email was sent to all the middle school principals' population at conventional middle schools in an urban school district with three years tenure at the same school, requesting their voluntary participation in the study. The email introduced me, provided my contact information, and described the research and my affiliation with the district. I

obtained these principals' names, tenure, and email addresses from the school district's public website. Participants had 2 weeks to respond to the initial invitation.

I garnered participation from middle school principals who led schools in the local district, thus I did not seek participation from middle school principals in a neighboring district who led a traditional middle school and have been principal at the same school for a minimum of 3 years. I did not need to use the state's reporting site to identify traditional middle school and the neighboring district's public website to identify the middle school principals' names and email addresses to send communication requesting their participation just as I did for the principals in the local district. I did not have more than 10 principals' express interest in participating in the study. Principals with the largest population of students and teachers would have provided more information regarding how they are guiding and training more teachers for leadership. All principals who were contacted provided consent within 24-48 hours via email and participated in the study.

### *Participation*

Once I received informed consent email from principals stating their willingness to participate in the study and had been a middle school principal at their school for consecutive 3 years, I scheduled a date and time for the semistructured interview. Interview dates were scheduled virtually based on the participants' availability with a Zoom link attached. The interview began with an introduction briefly stated the role of the researcher, and reviewing the background of the study, procedures, nature of the study, risks and benefits of the study, privacy, contact information, and answered any

questions the participant had. Participants were then asked for permission to be recorded

via Zoom.  Once I had participant permission, I recorded and interviewed the participant.

**Data Collection**

*Semistructured Interviews*

Data were collected via individual semistructured interviews and archival data in

the form teacher leaders' training plans and leadership meeting minutes. Interviews took

place via a video conferencing platform at a mutually agreed upon time to give the

participants enough time to respond to interview questions. Participants were asked

questions aligned to the research questions. Each question had follow-up and /or probing

subquestions to expand on the participants' responses. The video interviews were

recorded to ensure the accuracy of the responses. In addition to the video recording, I

opted for the audio recording and video platform transcription features. Before the

analysis began, the audio recordings and transcriptions were compared to ensure

accuracy. The collected data was organized using qualitative data software.

The data collection process took place over two months, and the interviews once

per participant for approximately 45-60 minutes in duration. The data collection process

used the local school district-approved video conferencing software, Zoom. Each

interview proceeded in the following order: First, I greeted the participants and thanked

them for their participation. Secondly, I reviewed the purpose of the study, informed

participants that the interview was recorded, and the anticipated length of the interview.

They were reminded that teacher leader training materials and meeting minutes from

August 2019-2020 would be used in the study. Next, participants had another opportunity

to consent to participate or remove themselves from the study. All consented participants remained in the study.

During the fourth step, I conducted the interview using questions in Interview Guide (Appendix A), presenting each question to each participant in the same order as written on the Interview Guide. Follow-up and probing questions were used when additional information was needed. At the end of the interview, I thanked the participant, allowed time for additional questions, and informed them about the option to request the transcript by email of the interview within 7-10 business days of the interview. Participants were asked to email me archival data, teacher leaders' training materials, and meeting minutes notes within 24-48 hours after the interview. Participants could decline providing archival data either verbally or in writing at any time. All participants accepted the use of the school's teacher leaders' training materials, and meeting minutes. Before ending the video call, participants were thanked again, and the video recording was stopped.

### *Archival Data*

Teacher leaders' training plan and meeting minutes from each principal were the second data set for this study. They were collected from the principals electronically. Each principal sent the training agenda and team meetings minutes from August 2019-August 2020 to me electronically. The documents were shared once in the form of a rolling agenda and with some PowerPoint presentations. A rolling agenda is a document that contains agenda/meeting notes from multiple meetings on one located in the school Google Drive. The training presentations provided data on specific leadership practices

related to how principals are developing teacher leaders. In addition, the meeting minutes will give greater insight into whether middle school principals did and our doing to train and guide the development of teacher leaders in their schools.

**Data Analysis Plan**

The data collected in the interviews and archival data helped in understanding this qualitative case study's central phenomenon. The two data sets were analyzed separately to triangulate the data. Qualitative data analysis can include inductive and deductive coding processes (Ravitch & Carl, 2016). An inductive approach was used to define themes (Patton, 2014) clearly. An inductive approach to coding stays as close to the data as possible, while the deductive approach to coding refers to outside sources rather than looking for something specific (Ravitch & Carl, 2021). An inductive approach was used for this study to analyze data to develop frequent or dominant themes captured from the raw interview and archival document review data, without barriers of structured methodologies (Creswell & Creswell, 2018). The study followed the process of organizing interviews and archival data into building codes, categories, and themes.

After all semistructured interviews were concluded, interviews and archival data were reviewed and transcribed within 2 months, and the data were used to answer both RQs. The collected data were reviewed several times to ensure the accuracy of the transcriptions with the recordings. Then, I read the transcripts and documents multiple times to decipher the raw data and to become acquainted with the data (Rubin & Rubin, 2012). Finally, data were coded using thematic analysis to develop understanding. The thematic analysis allows the researcher to see and sense collective or shared meanings

and experiences (Braun & Clarke, 2012). The first cycle of open coding involved searching for the repetition of specific words, phrases, and ideas relative to guiding and training the development of teacher leaders. Open coding is the process of searching for repletion in the raw data and concepts. A label will be used to give meaning to the open codes (Braun & Clarke, 2006).

The second cycle coding organized open codes into categories with similar qualities. The study used a pattern coding method. Pattern coding supports the qualified codes that "look-alike" and "feel alike" when combined (Saldaña, 2021). When open codes are put into categories that relate to each other, the researcher can then begin to identify temporary themes (Ravitch & Carl, 2016). The coding process generated themes that clearly explained each and how they were connected to develop further analysis. Rubin and Rubin (2012) defined a theme as the "statement in the role of ideas that summarize what is going on, explain what is happening, or suggest why something is done the way it is" (pg. 118). Themes were developed from data (Braun & Clarke, 2006) and from the role of the researcher in seeing the relationships between codes, combining codes, and discarding codes (Ravitch & Carl, 2016).

The analysis focused on "sets of constructs or concepts in relation to each other to make arguments and develop findings" (Ravitch & Carl, 2016, p. 250). Data were reviewed based on the framework and the research questions (Yin, 2018). Computer-Assisted Qualitative Data Analysis Software (CAQDAS) was used to help organize and sort transcripts and recordings (Bazeley, 2018).

*Discrepant Cases*

Discrepant cases in this study would involve looking for instances that contradict a particular pattern or findings in the data. The goal of looking for discrepant cases or outliers will be to challenge the researcher's theme (Ravitch & Carl, 2016). I avoided pitfalls of qualitative analysis by being transparent in defining the process and documentation of how themes were developed and explicitly describing the interpretations and analysis of how meaning was derived from the data.  There were no discrepant cases found in the study.

## Trustworthiness

Trustworthiness ensures that the study measures what is intended, and the credibility of the research is maintained following the established methods and procedures (Shenton, 2004). Trustworthiness is essential because it ensures the quality of the study through the data collected, interpretation of the findings, and methods used in the study (Ravitch & Carl, 2016). Validity in qualitative research refers to the quality and rigor of the study with the extent to which a concept is accurately measured (Ravitch & Carl, 2016). To achieve the validity of the qualitative study, this research used triangulation of the data and member checking. Triangulation is a method used by qualitative researchers to check and establish validity by searching for convergence among multiple and different sources of information to form themes or categories in a study (Creswell & Miller, 2000). Triangulation for this study included validating the findings of the data collected from the semistructured interviews and the review of the

teacher leaders' training agendas and leadership meeting minutes, which were analyzed to form the themes or categories in the study (Guion et al., 2011).

The second strategy used to achieve validity was member checking. Member checking provides an opportunity for the researcher to ensure the accurate portrayal of the participants by allowing the participants to review the data and confirm or deny its accuracy (Candela, 2019). Participants in this study had the opportunity to request a summary of data collected from the researcher within 7-10 business days after the interview was concluded. Furthermore, the participants had 7-10 business days to review the findings for any discrepancies and accuracy of the data.

**Credibility**

Credibility will be established by ensuring that the research design and the researcher's instruments and data are correctly followed (Ravitch & Carl, 2016). Credibility asks How congruent are the findings with the actual reality? (Yin, 2016). Credibility can also be significant in creating confidence that people can act upon data and results to make decisions in future research settings (Yin, 2018). In this study, I established credibility by using the strategies of reflexivity and triangulation of data sources. According to Merriam and Tisdell (2016), reflexivity happens when the researcher explicitly describes how the relationship between the participants and themselves can intersect. The themes and categories were developed from the semistructured participant interviews and the training agendas, minute meetings to identify how middle school principals train and guide teacher leaders' development. I maintained my positionality as an observer and acknowledged that my position may have

affected the research process (Merriam & Tisdell, 2016). My self-reflection required me to examine my assumptions, biases, and beliefs, as well as how I ask questions and my relationships with the participants and the effect of their responses (Mason, 2010).

Triangulation of data was the second strategy used to establish credibility. Semistructured interviews and archival documents were the two data sources triangulated. The purpose of triangulating the two data sources were to cross-check the data and compare and contrast the themes derived from the data sets (Creswell & Creswell, 2018).  By comparing both data sources and analyzing them separately, I created an accurate report and measured the intended outcomes.

**Transferability**

Merriam (2008) defined transferability as when research findings can be applied to other situations. Additionally, transferability in a qualitative case study is when the reader or another researcher can decide how relevant the results from one study are to a different study or context (Marshall & Rossman, 2016). The goal of transferability in qualitative research is how qualitative studies can apply to broader contexts (Ravitch & Carl, 2016). This study established transferability through a detailed description of the data collection and analysis based on participants interviewed. Middle school principals were invited and selected based on specific criteria. I ensured credibility and validity by collecting data properly and documenting, interpreting, and representing data so that other researchers can reach the same conclusion with the same data (Yin, 2016). Transferability can easily be achieved for future research on middle school principals

developing teacher leaders based on the context of the study and the approach taken to analyze data.

**Dependability**

Dependability was established by thick description. Dependability in qualitative research is vital to trustworthiness because it establishes that the findings are consistent and repeatable or stable over time. Therefore, the study's processes should be reported more directly to address the dependability issue, enabling a future researcher to repeat the work to gain the same results (Stahl & King, 2020). Thick description increases the complexity of the research by thoroughly defining the context of the study and contextualizing participants' responses so that readers can understand the factors in which quotes are presented (Ravitch & Carl, 2016). In addition, the thick description included detailed excerpts from interviews notes to reinforce dependability from the reader.

**Confirmability**

Confirmability was accomplished through reflexivity, with the researcher keeping a journal of data collection procedures before, during, and after that event. During the data collection process, I reflected consistently on my personal bias and relied on the transcribed data to capture the data as literally as possible without subjective interpretation. I also considered my role in the district and my knowledge of developing teacher leadership. The combination of credibility, transferability, dependability, and confirmability allowed for a trustworthy study (Rubin & Rubin, 2012).

**Ethical Procedures**

Prior to beginning data collection, the approval was received from the Walden University's Institutional Review Board (IRB) granted approval. Consent from the school district's research and evaluation department was obtained before reaching out to principals. Once IRB approval (03-21-22-1013795) for research was granted, participants were invited to participate in the study via email, requesting their consent in the body of the email. Participants responded via email with "I consent" before the data collection process commenced. Treating individuals as autonomous during the research will be kept at the forefront of the study. Kara and Pickering (2017) emphasized that a focus should be on participants' well-being by discussing data analysis and participant protection throughout the research process and dissemination of the findings. Because of the partnership agreement between Walden University and my employer, only adults could participate in this study. Participation in the study was voluntarily, and the rights of participants were communicated on several occasions during the process of the study. The email invitation outlined the participants' rights in writing. Participants were invited to schedule a video conference once they elected to participate in the study with formal "I consent" in the body of their email. The video conference included reviewing the expectations of the study, asking questions, and participating in the semistructured interview.

Conducting interviews can have an ethical issue with confidentiality. After the interview, details of the interviews, audio and video recordings, and transcripts were kept confidential. I ensured the security and privacy of the data collected for this study by

redacting all participants' names and their school names on the interview transcript, giving them a pseudonym. The pseudonym helped to know each participant's data from the other, analyzing data and reporting the findings. Data were stored on my password-protected personal laptop, accessible only by myself, and stored at my home. Interview notes and transcripts were held in a protected iCloud folder that will be destroyed after five years beyond completion of the study. The printed transcripts and other collected data are locked in secure cabinets at my home for 5 years after the study has been completed and destroyed at the end of that 5-year mark.

Participants had the liberty to withdraw at any point of the study with no adverse effects. In the case, a participant withdrew, the audio recording would have been deleted if participants cancel the study. Likewise, if the participant withdrew and archival data had been collected, documents would have been deleted and shredded. If the number of participants fell below eight participants due to a withdrawal, the researcher would have reached out to principals who did not respond to the initial email invitation via email and a phone call seeking their participation. Fortunately, there were no participants who withdrew from the study.

**Summary**

This chapter explained how this study was related to qualitative research. This qualitative case study used a combination of semistructured interviews and the school archival leadership meetings minutes and training agenda to explore middle school principals' perceptions of their role in guiding and training the development of teacher leaders in their schools. Also exploring what middle principals' practices used to guide

and train teacher leaders in their schools. I also discussed the participants, the data

collection process, and the analysis. Data were triangulated by using semistructured

interview responses and archival data. To meet the ethical obligations of the study,

appropriate permissions were obtained from the IRB, school district personnel, and the

participants according to Walden University and district policy. Finally, I established the

trustworthiness of this study through credibility, dependability, transferability, and

confirmability. Chapter 4 includes a detailed presentation of the findings,

recommendations, and conclusions in Chapter 5.

Chapter 4: Results

The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. The gap in practice was that little is known about how principals in urban middle schools guide and develop teacher leaders. Prior research revealed that principals understand the importance of shared and distributed leader; thus, there was a need for leadership strategies to use in developing teacher leader. I used the following two questions to guide the qualitative study:

RQ1: How do middle school principals perceive their roles and experience in guiding the development of teacher leaders in their schools?

RQ2: What practices do middle school principals identify in guiding and training teacher leaders in their schools?

I gathered data via one-on-one video conferencing interviews to answer these questions. Chapter 4 includes research study findings in conjunction with a description of the schools and district where the study was conducted. In Chapter 4, I present data collection and analysis processes, including organization. Additionally, I present an explanation of results as they pertain to research questions while emphasizing trustworthiness. The chapter begins with a description of the setting, data collection process, and analysis method. I address how study results relate and pertain to Bass' transformational theory. Results from this research may provide middle school principals with insight into how they can better train and guide the development of teacher leaders in their schools.

**Setting**

This study took place in the United States in a northeast urban school district. Each participant was interviewed via Zoom due to the COVID-19 pandemic. I emailed the partner organization agreement to the district research and evaluation department. After approval, I emailed the leader interview consent form to eight participants. Each participant responded to the email with the words "I consent." After receiving the email, I immediately scheduled one-on-one Zoom meetings during dates and times that were conducive to participants' work schedules.

## Demographics

The study's participants were eight principals from traditional middle schools from an urban district in the northeastern United States. Five of the participants were female, and three were male. Six of the participants had master's degrees in education, and two had doctoral degrees in education. Middle school principals in the study had 4-12 years of experience leading at their current schools. All participants had more than 3 years of tenure, meeting the criteria for participation. Table 1 summarizes the demographics of all participants by gender, position, educational level and tenure at the school in terms of years.

**Table 1**

*Demographic Information of Participants*

|  | Gender | Position | Education Level | Tenure (years) |
|---|---|---|---|---|
| Participant 1 | Male | Principal | Master's | 4 |
| Participant 2 | Female | Principal | Master's | 4 |
| Participant 3 | Male | Principal | Doctoral | 8 |
| Participant 4 | Female | Principal | Master's | 12 |
| Participant 5 | Female | Principal | Doctoral | 4 |
| Participant 6 | Female | Principal | Master's | 6 |
| Participant 7 | Male | Principal | Master's | 4 |
| Participant 8 | Female | Principal | Master's | 6 |

## Data Collection

A semistructured interview guide and an archival data review instrument that I created were tools used in gathering data to address the study's research questions. The data process consisted of interviews with eight middle school principals held via one-on-one via the Zoom video conference system. The interviews took place at the convenience of the participants. Each interview lasted approximately 45-60 minutes over a 3-week span of time.

The Zoom video conferences were recorded and transcribed directly from the platform. I saved the video conference and audio recording to my password-protected laptop. To ensure validity in the responses, I also recorded participants' verbal responses in the field notes of the interview guide. All interviews were completed following the same protocol. The only challenge was scheduling the interview with the middle schools

during the last 2 weeks of school and finding times to complete the interview in one seating.

## Interview Process

I used the northeastern urban school district website to identify each middle school. The district website identified each school as a traditional middle school serving students in sixth through eighth grade. Once I found schools that were identified as a traditional middle school, I used each school's landing page to identify the name and email of the middle school principals. I further asked the district's office supporting middle schools for data of middle school principals who had been in the school for at least 3 years. I followed the process to collect data as described in Chapter 3.

## Archival Data

I reviewed archival documents to triangulate the interview data for trustworthiness. The participants provided Teacher leaders' training agenda and meeting rolling agendas. Using the Archival Data Review instrument (see Appendix B), I collected notes by reviewing all training agendas and meeting minutes and used the notes as data for coding and categorizing purposes.

The number of teacher leadership trainings did not exceed more than twice a year. All participants noted during the interview that they at least hosted a leadership training/retreat at the beginning of the school year. Other participants used the leadership meetings as opportunities to also build instructional capacity of teacher leaders. The frequency and consistency of teacher leadership meetings varied as well. I read the meeting minutes several times to use for coding process and analyzing. In both

documents, I looked specifically at what leadership actions were middle school principals employing in developing teacher leaders. I looked for parallels between the actions and support based on the perceptions of middle school principals' role in guiding and training the development of teacher leaders in their schools. I stored training agendas and meeting minutes on my password-protected laptop. I will delete the training agendas and meeting minutes from my laptop after a period of 5 years. Additionally, all paper documents that I printed will be stored in my personal at-home cabinet for 5 years after the study. I will delete and remove all training agendas and meeting minutes from my laptop hard-drive at the end of the 5-year mark and shred the paper copies that I printed. Nothing abnormal occurred during the data collection process of completing semistructured interviews or reviewing of the archived climate data.

## Data Analysis

I analyzed the qualitative data collected from the middle school principals' semistructured interviews and archival documents through thematic coding, specifically using the inducive approach. Thematic analysis is defined as a qualitative research method in which the researcher interprets themes within the data set by using the process of identifying, analyzing, organizing, describing, and reporting (Nowell et al., 2017). This process was done by reviewing data from transcripts and documents by assigning codes, cataloging the common phrases found in the responses into categories, and identifying common themes (Creswell & Creswell, 2018).  The purpose of using an inducive approach was to naturally discover themes from the raw interviews and archival documents, as well create meaning in relation to the research questions. The research

questions for the study are aligned to this type of coding because they were designed to explore the perceptions of middle school principals' understanding of their role in training and guiding the development of teacher leaders.

I listened to the audio recordings and edited the transcriptions to ensure accuracy of participants' words. Participants sent their teacher leadership training agenda and leadership meeting minutes electronically via email or shared it with via Google Drive within a week of the concluding the interview. I uploaded all interview transcripts, field notes, and archived documents from my password-protected laptop for storage and organization using the CAQDAS qualitative data analysis software. The software assisted with identifying terms and phrases used more frequently in the transcriptions, notes, and archival documents. CAQDAS did not perform the actual thinking. Saldaña (2021) states that CAQDAS does not and should not conduct the analysis. I simply provided data in terms of text and gave step-by-step instruction to the software to carry out the procedures of coding.

I began familiarizing myself with the data while I was calibrating for error and making meaning from the transcriptions and field notes. I then began with the first cycle of coding by reading the data in detail multiple times. The goal was to identify common words or phrases (see Table 2). Using open coding, I read all the responses and began to organize words that were alike to aid identify possible categories (Williams & Moser, 2019). The first cycle coding revealed words like *leadership development, coach, training, transparency, leader in me, growth, support, modeling expectations, outside of the classroom, provide feedback, and support others.* These codes were repeated words,

phrases, and concepts that middle school principals mentioned during semi structured interviews.

During the next round of coding, I determined the categories by taking single words or phrases and creating descriptive codes that summarize the data. The responses were then placed into several categories (see Table 2). With the categories some of the terms that emerged were *teacher voice in decision making, professional leadership opportunities, characteristics of teacher leaders, and established shared leadership.*

To complete the coding cycle, data were analyzed again to develop themes. The themes were developed from analyzing the codes and categories continuously. The cyclical process identified recurring themes that were important to my understanding of what strategies middle school principals are employing to face the challenge of the developing teacher leaders in their schools. Data were grouped based on similarities, which led to categories and then to themes that answered the RQs. The interview data, archived teacher leader training agenda, and leadership team meeting minutes were analyzed separately. The cyclical process of coding and the transformational leadership theory framework were used to examine the emerging themes. Five themes emerged from the analysis: (a) perception of teacher leaders, (b) cultivating teacher leadership, (c) understanding the role of teacher leaders, (d) selecting teacher leaders, and (e) building the capacity of teacher leaders (see Table 2).

**Table 2**

*Codes, Categories and Themes Used in Data Analysis*

| Codes | Categories | Themes |
|---|---|---|
| • Leader's Responsibility<br>• Coach<br>• Trust<br>• Model<br>• Transparency<br>• Clear vision<br>• Teacher ownership<br>• Provides resources | • Teacher Voice in Decision Making<br>• Career Growth<br>• Distributive leadership | • Perceptions of Teacher Leaders |
| • Clear expectations<br>• Interested in leadership<br>• Leadership responsibilities<br>• Duties and roles<br>• Encourage<br>• Empower | • Professional leadership opportunities<br>• Leadership experiences | • Cultivate Teacher Leadership |
| • Inside and outside of the classroom<br>• Department chairs<br>• Provide feedback<br>• Knowledgeable<br>• Guide others<br>• Facilitate the learning | • TL Actions<br>• Principals' Definition of TL<br>• Characteristic of TL | • Understanding the role of Teacher Leaders |
| • One-on-one conversations<br>• Interviews<br>• Principals identified<br>• Self-nominate | • Process of selecting TL<br>• Identify Potentials | • Selecting teacher leaders |
| • Collaboration<br>• Structure programs<br>• Support<br>• TL needs<br>• Provide feedback<br>• Lack of guidance and training<br>• Develop instructional capacity<br>• Supporting colleagues<br>• Professional development opportunities | • Developing teacher leaders<br>• Training for Principals<br>• Establish Shared Leadership | • Building the capacity of teacher leaders |

*Note*. TL = Teacher Leader.

Teacher interviews helped answer all the research questions while archival documents helped to corroborate the training, guiding and support middle school principals provide teacher leaders. The creation of themes also enabled me to address the RQs for this study (see Table 3). The themes of *perception of teacher leaders*, *selecting teacher leaders and understanding the role of developing teacher* leaders were used to answer RQ1, which explained how middle school principals defined and perceived their role in guiding and training the development of teacher leaders, as well as what leadership actions that encouraged this type of leadership. Perception of teacher leaders aligned with Bass's transformational leadership theory tenet 4 as it was the middle school principals' *inspirational motivation* of being a role model, transparent, defining what teacher leadership was, and having a clear vision of what was expected that resulted to the development of teacher leaders.

Middle school principals used transformational leadership theory tenet 2, intellectual stimulation to establish a process of selecting teacher leaders and leadership characteristics each principal was looking for. Principals sought out untapped potential and challenged the teachers to take on leadership opportunities that they did not see themselves doing in the past. Two of the eight participants strongly believed in encouraging risk taking and allowing teacher leaders to not be afraid to step into leadership opportunities.

The themes of *cultivating teacher leadership* and *building capacity of teacher leaders* answered RQ2, which identified opportunities created by principals for teachers to develop their leadership, specific leadership responsibilities required of them, and what

structures in place that have been successful for their development. Principals reflected on their leadership practices used to support the growth and development of teacher leaders. Cultivating teacher leadership theme correlates with Transformational Leadership Theory tenet 1 idealized influence, which emphasize on trust, respect, and developing collaboration among teachers to perform tasks and share knowledge. Principals believed that their leadership practices and behaviors developed beliefs on teacher leader's ability to do more in their school. All but one participant stressed the importance of prioritizing collaboration, supporting teachers with the resources they need, and giving potential leaders opportunities for growth. One principal stated that schools should empower teachers by listening to their ideas and create a "culture of leadership" in which teacher leaders emerges organically every year.

Lastly, the theme of building capacity of teacher leaders aligned with Transformational Leadership Theory tenet 4, individual consideration, revealing the influence of the principals on every teacher leader. Principals knew their teacher leaders' needs and were willing to put in the time it took to develop these teacher leaders. In addition, they were open and encouraging to teachers. They also created informal and formal structure to guide and train the on-going development of teacher leader. Lastly, principals provided teacher leaders with feedback regarding their leadership journey and working with other teachers to support their improvement with classroom instruction which can influence student achievement.

**Table 3**

*Themes Alignment With Research and Conceptual Framework*

| Research Questions | Subquestions | Themes | Transformation Leadership Theory |
|---|---|---|---|
| RQ1: How do middle school principals perceive their roles and experience in guiding the development of teacher leaders in their schools? | • What is your perspective of your role, in guiding and training the development of teacher leaders in your school?<br><br>• What is your process for identifying teacher leaders in your school? | • Perception of teacher leadership<br><br>• Selecting teacher leaders<br><br>• Understanding the role of teacher leaders | • Inspirational Motivation<br><br>• Intellectual stimulation |
| RQ2: What practices do middle school principals identify in guiding and training teacher leaders in their schools? | • What is your experience, as a middle school principal, in guiding and training the development of teacher leaders in your school? | • Cultivating teacher leadership | • Idealized influence |
| | • How do you support the growth and development of your teacher leaders? | • Building the capacity of teacher leaders | • Individualized consideration |

**Theme 1: Perceptions of Teacher Leadership**

The theme of principals' perception of teacher leadership included the categories of teacher voice in decision making, career growth, and distributive leadership. All principals interviewed emphasized the importance of developing teacher leaders in a school, and their role in doing so. Participant 2 discussed that principals are solely responsible for developing teacher leaders "being the leader of leaders," and principals need to understand what teacher leaders require to have a voice in the decision-making process.

The second category within this theme was career growth. In this area, participants were unanimous in stating that providing leadership opportunity were critical to the teacher's career growth. Participant 2 shared that it was her role to understand what her teachers and potential leaders needed and created opportunities to support them. She mentioned that she always has conversations with teachers about where they see themselves in 5 years. For those who aspire to leave the classroom or have other future leadership ambitions, she provides them with opportunities to prepare for it. Participant 4 talked about how teacher leaders may also aspire to formal leadership roles, such as principal or assistant principal, and encouraging them to serve as teacher leaders may offers preparation for those roles. She also emphasized the conversation she has with teachers about the true reason for wanting to come of the classroom, because working with adults as a leader is very different.

Finally, all participants discussed how they encourage teachers' ownership and described various type of ways they distribute teacher leadership within their school.

Participant 2 discussed that she is transparent with her staff and provides a lot of

distributive leadership, because she knows that all work cannot fall on just one person.

She provided opportunities for teachers to "lead professional development,

collaboratively planning and leading staff meetings." Participant 6 illustrated distributive

leadership by empowering her teachers to "planning data meetings, new teacher academy

meetings and mentoring novice teachers." Participant 5 encouraged distributive

leadership at his school by empowering his teacher leaders to serve as liaisons between

administrators and teachers. He invites teacher leaders to be part of the decision making

around systems and structures that the school is implementing and then serve as a liaison

between the school leaders and teachers.

**Theme 2: Selecting Teacher Leaders**

The second theme to emerge involved two categories that focused on the process

of selecting teacher leaders and the characteristic to identify teacher leaders' potentials.

All school leaders interviewed agreed to having some time of process, informal or

formal, to select teachers for leadership roles. They also shared challenges that they are

now facing with teachers' minimal of interest in teacher leadership roles. While five

participants used a formal process to recruit and select, the other three have an informal

process to select teacher leaders. The five participants' formal processes include

completing an application, interviewing, and "…also given a task to kind of display their

leadership skills." Participant 1 described the process of selecting teacher leaders at his

school as being informal, but a collaborative effort between him and his assistant

principals. He explained his leadership effort:

I employ a multi prong approach... meeting with my assistant principals and

asking them for their input. I'm not skipping over that leader that's in the middle

of the assistant principal. Our discussion will factor several things to determine a

good fit- from teacher's student achievement, interactions with other colleagues to

their work ethic…...The decision is not made alone… after we collaboratively

select, we then send a google form with an application.

Selecting teacher leaders begins with identifying teachers with leadership potentials.

Participant 4 stated that "an effective leader can see something in a person that may not

even see that you know you do have the potential to be a great leader so formerly."

Participant 7 talked about how at times "you're going to have to volunteer for other

people to be leaders based upon their potentials."

**Theme 3: Understanding the Role of Teacher Leaders**

The first category that was found within the understanding the role of developing

teacher leaders was the principals' definition of teacher leader. Participant 5 defined

teacher leader as "…individuals who do not have supervisory capacity, however, they

provide instructional mentoring and coaching…they develop other teachers' capacity to

influence student achievement in a greater a way." Participant 4's definition focused on a

teacher leader instructional capacity. She stated: "Teacher leadership are professional

educators who not only teach their content or focus on a pedagogy, but they have the

ability, and the capability to take initiative, develop facilitate and coordinate."

The second category that emerged with this theme was teacher leaders' actions

and characteristics. Middle school principals described a teacher leader and the

characteristics they are looking for when selecting teacher leaders. Participants 4 alluded

to what characteristics to look for when considering a teacher for leadership roles. "The

number one characteristic I am looking for is a level of integrity and character, because

for people to follow you, and be an effective leader people must have a sense of respect

and trust." Participant 3 stressed trust and transparency as her two non-negotiable

characteristics of a potential teacher leader "it's very important for me to trust teachers

and it is very important for them to trust me... it's very important that they understand

how much their role plays a pivotal part with improving school culture." Lastly, the

overwhelming characteristics that other participants identified for teacher leadership

potential included the following: Reflective nature, continuous improvement mindset,

team player, strong work ethic and trustworthy, coachable, innovative, and forward

thinker.

**Theme 4: Cultivating a Culture of Leadership**

The fourth theme to emerge was cultivating a culture of leadership. All

participants indicated that a culture of leadership is cultivated when principals are

providing various professional leadership opportunities and leadership experiences. In

order to provide these opportunities, the study sought to understand the principal's role in

developing teacher leaders. Words like support, consistency, facilitator and coaching

were common when asked about three words that describe the role of principal in training

and guiding the development of teacher leaders (see Table 4).

**Table 4**

*Words Describing Principal's Role in Developing Teacher Leaders*

| Participant | Role | Key Term 1 | Key Term 2 |
|---|---|---|---|
| Participant 1 | Guide | **Support** | Mentor |
| Participant 2 | Transformational | **Consistent** | Transparent |
| Participant 3 | **Coaching** | Persevere | Passion for students |
| Participant 4 | Listener | Mentor | **Coach** |
| Participant 5 | **Coach** | **Support** | Clarity |
| Participant 6 | Facilitate | Serve | Monitor |
| Participant 7 | Facilitator | Co-Facilitator | Leader of PD |
| Participant 8 | Consistency | Equity | Balance |

Each participant described their role in training and guiding the development of teacher leaders. Words like support, consistency, facilitator, coaching were mentioned more than one time. Participant 8 believed that having consistency, balance and equity can develop teacher leadership.

> Consistency because I think if you have a plan, and you start up with this great plan if you're not consistent. The plan is not going to be as effective um I think you need to have balance, because you don't want to overwhelm anybody. As you're developing the leaders, and I think you need to have equity, so, as I stated earlier, I identify teachers of the beginning of the year. But what I often do is ask them if they're interested in service teacher leader, so I don't want anybody to believe I'm selecting a particular teacher because I'm playing favorites, so I give the option for teachers to be a part of this work that I'm doing and developing them these leaders so consistency balance and equity. (Participant 8, Pos. 4)

Participant 2 described her role in being transformational, transparent, and consistent while training and guiding the development of teacher leaders. She explained her approach to coaching:

> Teacher leaders need to know that in the coaching round that you're going to be very transparent with them about what it is that you expect from them and what you're trying to get across to them. And that you're trying to build their capacity... and consistency is you cannot just start with the coaching process and. Just drop a teacher.

Participant 5 discussed the principal's role in identifying the needs of teachers to aid cultivate teacher leadership. "More than anything... teacher leaders want support. It is my role to talk through something they want to do or a challenge they need a push to navigate a new environment… they might need strategies to deal with leadership challenges. My goal is not to give them an answer but leads to discover it."

**Theme 5: Building the Capacity of Teacher Leaders**

All participants agreed on the need to provide supports that will develop teacher leaders. They also talked about the role of the principals to support teacher leaders' desire to grow and professional development. Participant 3 supported teacher leader using every leadership challenge as coaching experience and provided opportunities for them to develop their leadership skills. He described how he supported teacher leaders through providing opportunities: "I am a type of leader who would coach teacher leader to innovate opposed to telling you what to do." Participant 4 discussed how he used individual teacher leaders' need to mentor/coach to meet their leadership goals and

become effective teacher leader. Participant 7 reported that he supports his teacher leaders being the one "who formulate the trainings that needs to be occur. Lastly, participant 2 expressed supporting teacher leaders can individualize. He stated:

And I've trained them myself so sometimes they've had the opportunity to just sit with me for individual training. Whether it's something regarding the school performance plan or something regarding school-based budget or just things that I think that they need to know as leaders.

Participant 2 mentioned that another strategy to develop teacher leaders is to provide opportunities, "when teacher leaders present an initiative that will support the school vision or their personal growth, I let them take the initiative and run with." Providing opportunities to grow and accepting teacher leaders' suggestion are ways to build their capacity. Accordingly, building the capacity of teacher leaders should be a top priority for principals.

## Results

The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. The results from the eight interviews with middle school principals as well as a review of the teacher leader training agenda and leadership meetings are summarized below.

### Research Question 1

RQ1: How do middle school principals perceive their roles and experience in guiding the development of teacher leaders in their schools?

*Interview Data*

Based on the results from the interviews, participants shared similar perceptive and experiences in developing teacher leaders. Data gathered during the interview fell within five themes: Perception of teacher leadership, selecting teacher leaders, Understanding the role of teachers, cultivating teacher leadership, and building the capacity of teacher leaders.

Each middle school principal was clear about the perceived role in developing teacher leaders. Participants repeated similar phrases to include coach, support, influence, and motivate when describing their role. Participant 5 stated, "ultimately my role is ensuring capacity building of all teachers and influence some to lead beyond the classroom."

Defining teacher leadership was important to better understand how participants perceive teacher leaders. All participants defined a teacher leader as someone who leads by example, extend themselves as an initiator, problem solver, and supporter of their colleagues. Five of the participants defined teacher leaders as someone outside of the classroom, while three principals noted that teacher leaders can be teachers who are either still inside the classroom leading a team or mentoring other teachers, or outside of the classroom serving. Some additional characteristics of teacher leaders that were noted in the participants' responses were trust and respect from other teachers in the building. The selection of teacher leaders depended on the participants' definitions of teacher leaders and what specific roles and responsibilities they were to assume.

All eight participants shared various ways they empowered their teachers to develop their leadership skills inside and outside of the classroom. They each expressed the will to share the leadership and intentionally select teachers who have shown interest and ready for additional responsibilities. Shared leadership and distributive leadership were the most referenced approaches throughout the interviews. Each participant emphasized the importance of having a clear vision and understanding of the role, as well as communicating the expectation. In addition, participants modeled for teachers. Participant 6 stated, "First things is modeling. It is very important that I model a strong leadership skill and then provide opportunity for people to grow."

All the participants shared similar statements that teacher leaders greatly contribute to the success of the school. Participant 4 stated "I don't know what I will do without them. They are ambassadors here to help me fulfill the vision of the school. It is role to share the vision and inspire individual to make it happen." Participant 5 echoed this notion with a similar statement about the contribution of teacher leaders. She believed that teacher leaders "advance the drive of our vision and mission. They help implement that part." She continued that teacher leaders can also contribute with their voice and perception in the decision making. Teacher leaders can also contribute by taking ownership of their learning, developing others, and advancing the vision of the school. Participant 1 explained that with adaptive leadership, he gives the work back to the people stating, "when the ownership of the work transfer and I can see the vision lived and impact without the directions; that's when I know they are having a true impact."

***Teacher Leader Training Agendas***

Data from the training agendas provided an opportunity to triangulate the information provided by the participants during the interviews to answer research question 1. The training agenda supported participants' perceptions of their role in developing teacher leaders. All participants provided a form of professional development/ training for teacher leaders prior to school starting, in form of a leadership retreat or academy. Participants 2, 6, and 7 training outcomes were similar, understanding the vision and mission of the school, creating expectations for the school year, discussing challenges facing the school, and knowing your "why" and leadership strengths. Participant 1 planned a training focused on the Teacher Leader Model Standards (TLMS) as the focus of the development for the school year. The teacher leaders learned about the knowledge, skills, and competencies needed to assume leadership roles in their school. Participation 4's agenda was centered around knowing yourself as an equity teacher leader and how you present working others. Participants 3 and 5, had seasoned teacher leaders so their focus of development was on fostering a collaborative culture to support educator development and student learning. Teacher leaders deepened their understanding of the principles of adult learning and how to develop a culture of collective responsibility in the school. Participant 8 spent a weeklong leadership academy engaging teacher leaders to learn the school improvement cycle process. In this training, the objective was for the teacher leader to use the knowledge to foster an environment of trust and respect with continuous school improvement mindset.

**Research Question 2**

RQ2: What practices do middle school principals identify in guiding and training

teacher leaders in their schools?

*Interview Data*

The second research question explored the leadership practices employed by

middle school principals to train and guide the development of teacher leaders. All

participants mentioned the importance of knowing the needs of your teacher leaders, as

well as providing layers of support. Participant 2 noted that differentiated support is

needed in term of building teacher leaders' capacity. She continued with "I am blessed

with four assistant principals who provide one-on-one support to teacher leaders."

Participant 4 noted that the best way of supporting teacher leader is "by being present and

having a high level of support." Participant 6 considers her teacher leaders as her

students. She stated, "the disconnect I have been addressing is teacher leaders not feeling

supported with the administrator over a specific subject area." Understanding the needs

of my teacher leaders, "I am very transparent and very collaborative. I meet them where

they are. Push them to think outside of the box." Participant 8 echoed that the biggest

need in guiding and training teacher leaders is building their instructional capacity, "you

really must know how to facilitate effective collaborative session".

Thus, most participants described the quality of the training and guiding the

development of teacher leaders being effective, the rest of the participants stated that they

have room for improvement. All participants stated that they offered most of the trainings

by themselves, with some support from district partner depending on relationships and

who you know. Participant 3 noted, "I must be every strategic to ensure I am consistent with what I intended to do…I would love to see things differently." Participants described different experiences with district support when it comes to developing teacher leaders. Participant 5 emphasized that, "there is no district wide emphasis." There is greater support needed at the district level to allow the principal to do the work.

Participants needed training to become more effective in developing teacher leaders. While participants highlighted effective leadership practices employed in their respective school, they required the support from the district building their capacity to effectively train and guide the development of teacher leaders.

### *Leadership Team Meetings Minutes*

Data from the leadership team meetings minutes provided an opportunity to triangulate the information provided by the participants during the interviews to answer research question 2. The leadership team meetings supported clear leadership practices employed by middle school principals to develop teacher leaders in their school. Participants used leadership team meetings to involve teacher leaders in the decision-making process, as they discuss and address school wide issues, and initiatives that will impact learning and the school growth. Participants 1, 2, and 6 worked with their teacher leaders to build collective understanding around effective collaborative planning meetings. Teacher leaders learned strategies to effectively run a collaborative planning meeting. There was also evidence of frequent assessment and reflection of how teacher leaders were facilitating collaborative planning. Participant 8 and her team, including teacher leaders, discussed the need to establish a process of trust and building buy-in with

teachers. Participants 4 and 7, once a month, engaged teacher leaders in reading articles related to developing their leadership skills. The articles focused on providing feedback teacher, and effective departmental collaboration. Participant 3 and 7 facilitated a book study with their teacher leaders to build their instructional capacity. Each teacher leader was assigned a chapter to read, and together the team discussed and determined next steps to apply in their leadership journey.

## Evidence of Trustworthiness

Trustworthiness is one-way researchers can persuade themselves and readers that their research findings are relevant and worthy of attention (Nowell et al., 2017). Nowell et al. (2017) stated that for qualitative studies to be considered trustworthy, it is required that the research findings be credible, transferable, dependable, and confirmable. Knowing that the results and recommendations of this study may inform urban school district leaders' practices and future topics of research. The researcher used various strategies to ensure the credibility, transferability, dependability, and confirmability of this research as the results may influence others. The concepts of credibility, transferability, dependability, and confirmability are intertwined and interdependent (Lemon & Hayes, 2020), and aid researchers with visualizing, engaging with, and planning for many aspects of trustworthiness (Ravitch & Carl, 2016).

### Credibility

According to Shenton (2004), the first step of fostering trustworthiness in research is by establishing credibility, particularly in data collection. To determine the credibility of the process, data analysis must be completed in a precise, consistent, and exhaustive

manner through recording, systematizing, and disclosing the methods of analysis with enough specificity (Nowell et al., 2017). Accountability measures and ensuring the review process is thorough also promotes credibility (Gentles et al., 2015). To maintain credibility, I followed the correct methods and procedures for interviewing participants and collecting and analyzing data to maintain credibility. Participants who met the study criteria were selected, being the school principals of traditional middle schools in the urban school district who had served as principal at the same school for 3 years or more. Participants received an email requesting consent. The middle school principals who willing to participate responded to the email with the words "I consent." Data analysis software, CAQDAS, was used to organize the interview and archival documents data.

Triangulation and member checking of the research were used to ensure credibility. Researchers use member checking to validate the results of the study and assess and challenge the researcher's interpretations and accuracy of the analysis (Ravitch & Carl, 2016). I provided the opportunity for participants to calibrate the interview and archived data collected with the analysis of the findings. After reviewing, participants did not request any changes. Triangulation is addressed by verifying that the evidence of two or more sources confirm the themes drawn (Creswell & Creswell, 2018). To increase credibility and accuracy of my findings, I corroborated the findings of interview data and the summary of archival documents data.

**Transferability**

Transferability is essential in research because the protocols and procedures should be replicated in different circumstances by other researchers, and the findings

should be useful to continue to study this phenomenon. Transferability should be the goal of qualitative research, in which qualitative studies can apply to larger contexts (Ravitch & Carl, 2016). Transferability was established by purposeful selection across the population of middle school principals to ensure enough participants. The selection process produced eight participants, principals of traditional middle schools with a minimum of 3 years of experience at the same school. In addition, a thick description strategy was also used for external validity and helped transfer the study's findings. The use of rich descriptions regarding the setting, participants, data collection, analysis, and finding allowed anyone unfamiliar with the research to understand the context of the study and the research, adding to the overall transferability.

**Dependability**

According to Nowell et al. (2017), dependability occurs when researchers can ensure the process is documented, logical, and traceable. The dependability of this study was established using an audit trail by documenting the research process throughout the study and helping the reader come to conclusions about the data (Holloway & Galvin, 2016). An audit trail is a detailed record of the decisions made before and during the research and describes the research process (Earnest, 2020). Anney (2014) described dependability as "the stability of findings over time" (pg. 278) and whether the data answers the research questions (Ravitch & Carl, 2016). I described the decisions I took from the study's beginning to the findings' analysis and reporting. This is important because it does ensure that readers can trust that the data found in this study would be equal if the study were repeated.

**Confirmability**

Confirmability in this study was established through the researcher reflexibility processes and by consistently reflecting on my own personal bias, prejudices, and preconceptions related to principal's role in developing teacher leaders. Creswell and Creswell (2018) indicated reflexibility permits the researcher to reflect on how their role in the study and their personal background, culture, and experiences could affect their understandings of themes in the data. I maintained the interview process by recording the participant interviews and ensured to remained focused on the purpose of the research, answer the research questions, and not allow my personal or professional opinions obstruct upon the collection of data. Lastly, confirmability in this study was also ensured by providing the participants the opportunity to review the transcripts of interviews. Validity in qualitative research is the way the researchers can support that the findings are accurate to the participants' experiences (Ravitch & Carl, 2016). Several methods were used to meet the credibility, transferability, dependability, and confirmability criteria of a trustworthy study to ensure validity.

## Summary

In this study, I explored middle school principals' understanding of their role in guiding and training the development of teacher leaders in their schools. I used the research questions to explore the conceptual framework of the transformational leadership theory. I found that middle school principals used several strategies to develop leadership skills through times and resources that help teacher leaders grow in their knowledge and skills. Participants expressed strong beliefs around having a clear vision

for the role and intellectually allowing teacher leader to grow within the school. Middle school principals, based on the interview responses, see the importance of teacher leaders and are optimistic that with time and intentionality the leadership practices used to train and guide the development of teacher leaders would result in overall school impact and increase in student's academic achievement. I also outlined evidence of trustworthiness of this study as it relates to the strategies used to collect and analyze data. In chapter 5, a more detailed discussion of the study's findings is provided, as well as the limitations of the study, and researcher recommendations based on the collected data.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. I was seeking to discover middle principals' understanding of their role in developing teacher leaders and what practices middle school principals used to guide and train teacher leaders in their schools. By gaining a better understanding of middle school principals' role in developing teacher leaders, district leaders may provide support to current and future middle school principals, as well as identify defined leadership practices to train and guide the development of teacher leaders.

I found that middle school principals used two approaches to guide and train the development of teacher leaders: (a) fostering a culture of leadership development and (b) building the capacity of principals and teacher leaders. In terms of fostering a culture of leadership, I found that middle school principals strongly believed in creating a clear vision and intentionally allowing teacher leaders to grow. Participating middle school principals developed specific school goals around developing teacher leaders and provided authentic leadership opportunities in their schools. Despite being faced with overwhelming tasks related to school improvement, middle school principals also legitimized the work of teacher leaders and the contribution of their work. Middle school principals displayed leadership behaviors that supported the understanding of their role and implemented leadership practices that guided and trained the development of teacher leaders. Principals also expressed the challenges faced in developing teacher leaders, which appear to outweigh many of the leadership practices implemented.  Chapter 5 will

provide a detailed discussion of the study's conclusion based on the collected and analyzed data.

<div align="center">**Interpretation of the Findings**</div>

In this chapter, the conclusions of the study are discussed in detail based on the collected and analyzed data via categorization and theme identification. The conceptual framework for this study was Bass' transformational leadership theory (Bass, 1990).

**Key Finding 1: Fostering a Culture of Leadership Development**

Principals can train and guide the development of teacher leaders by fostering a culture of leadership development. Research affirms that the success of teacher leaders depends on the culture, relationships and structures with adequate support and understanding from the principal (Cooper et al., 2016). In this study, the most beneficial leadership approaches that supported developing teacher leaders were developing a culture of collaboration and trust and promoting a shared vision and goals for the school. This information confirms research from Conan Simpson (2021) who stated that teacher leadership has been shown to benefit teachers and improve the large school learning community. The perspectives of middle school principals are critical to the practices employed to train and guide the development of teacher leaders. This was evident in the discussions with middle school principals that their leadership approaches and view of teacher leadership made the biggest difference.

Research also indicates that principals can promote teacher leadership by encouraging teachers to lead initiatives, creating opportunities for professional development, and celebrating the effort of teacher leaders (Conan Simpson, 2021).

Middle school principals provided opportunities for professional growth through school-based professional development and partnership with district partners. Further, they differentiated and layered the support with individual conversations with teacher leaders, to identify strengths and growth areas in their leadership journey. Participants also encouraged teachers to showcase their pedagogical skills and expertise while providing feedback, which creates opportunities for authentic leadership roles and a culture of learning. Further, middle school principals' understanding, and use of shared/distributive leadership led to effective teams and the development of teacher leaders (see Smylie & Eckert, 2018). In support of these findings, Pineda et al. (2019) indicated schools must move from a top-down model of leadership to leveraging the capacity of others within to lead the change while nurturing and growing the formal and informal leadership roles of teacher leaders.

**Key Finding 2: Building the Capacity of Principals and Teacher Leaders**

Middle school principals of urban school district would benefit from understanding what leadership practices they can employ to develop teacher leaders. In this study, there were two identified leadership practices that guided and trained the development of teacher leaders. The first leadership practice used was to build the capacity of teacher leaders by providing professional development opportunities based on the needs of teacher leaders. Munguia (2017) stated that principals set the direction of the school, develop people, and create systems and structures to meet the needs of teachers. Thus, the teacher leadership development models were not uniform across schools, but all middle school principals in this study had established some type of structured teacher

leadership development program in their schools. This finding confirms the need for principals seeing the value of formally or informally developing teacher leaders (Leithwood et al., 2017). Second, middle school principals in this study believed in the redistribution of power and authority to encourage shared learning (Cheng & Szeto, 2016). Middle school principals provided support and resources to keep teacher leaders motivated and to build on their leadership skills. Some middle school principals allocated funding to send their teacher leaders to additional workshops and conferences outside of the school.

Middle school principals know there is a need to build teacher capacity, but as evidence from the data collected from interviews illustrated, the development of school leaders and time needed can increase the effectiveness of developing teacher leaders (Yeigh et al., 2019). While middle school principals have effectively implemented teacher leader development programs and have cultivated leadership opportunities, they are not confident this will be sustainable. A district generalized teacher leader development structure and a professional learning plan for middle school principals to train and guide are important to ensure fidelity, as well as the capacity building of middle school principals.  Time was also a common phrase that emerged during the interview. Middle school principals expressed not having enough time to work with teacher leaders to meet their individual needs and implement the development program.  Implementation of leadership practices embedded in every day school are not sufficient for training and guiding the development of teacher leaders.

**Limitations of the Study**

There were several limitations to the study. First, the sample size was small. The study's findings were based on the interview responses from eight school principals who had been principal at their school for a minimum of 3 years and were leader of a traditional middle school. The number of participants met the qualitative research methodology requirements, because it was within the target range of participants. Rahman (2016) suggested a small sample size depending on the amount of data being collected and analyzed. Purposeful sampling was needed to address this limitation.

A second limitation was the review of archival documents as middle school principals have the autonomy over the content of trainings and meetings, the frequency of leadership trainings and meetings, and the selection of who participates in the training and meetings.  The third limitation was not including teacher leaders' perspectives on middle school principals' role in developing teacher leadership. Last, the researcher working in the same school district as the participants was a limitation.

**Recommendations**

One recommendation for future studies is to expand the scope of the study to include the perspective of teacher leaders. The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. Conducting interviews with teacher leaders could further explore what they perceived as the role of principals in training and guiding their development. During these interviews, additional perspectives will provide a deeper

understanding as to what leadership practices middle school principals need to employ to better train and guide the development of teacher leaders.

Another recommendation is deeply analyzing middle school principals' statements of leadership practices supporting teacher leader with specific examples and criteria for success. Most participants did not provide detailed examples and specific practices, rather they provided general responses that responded to the research questions. A deeper analysis of the practices employed by middle school principals may provide a deeper view of effective practices to guide and train the development of teacher leaders.

**Implications**

The implications from the findings of this study showed there is a need to develop teacher leadership and equipping middle school principals with more specific leadership practices to meet the needs of teacher leaders. In this study, fostering a culture of leadership and building the capacity of teacher leaders positively influenced the development of teacher leaders. The study found that while middle school principals understood their role in developing teacher leaders, and had the will to do so, they were limited with their own capacity and time to support the development of teacher leaders. It was revealed that there is a need for the school district to review the support given to middle school principals to develop teacher leaders in their schools. While middle school principals used many leadership practices to increase the knowledge and enhance practices of teacher leaders, they did not identify which leadership practices were effective in developing their leadership over time. If a middle school principal in an

urban district had the best leadership practices developed, they would have the potential

to effectively train and guide the development of teacher leaders.

**Social Change at the Organizational Level**

All middle school principals interviewed had a clear understanding of their role in

developing teacher leaders and had employed leadership practices they believed were

developing teacher leadership, yet there was minimal guidance for the principals

themselves. Middle school principals determined on their own the approaches and

leadership practices to use with no evidence of effectiveness.  The organizational change

that could be supported by this study is the need for uniformed teacher leader training

model, and support from district partners specialize in building capacity of leaders to

develop personnel. District partners could determine the areas of growth with the middle

school principals and provide similar leadership practices to employ across all middle

schools.

The results of the study indicate middle school principals' beliefs valued teacher

leadership but need knowledge of leadership behaviors to develop teacher leaders.

Middle school principals with limited knowledge of what the literature says about teacher

leadership used a vague understanding of the need to develop teacher leaders. As a result,

specific leadership behaviors that could have been beneficial for their understanding were

not identified. Potential changes in the organization focused on professional development

for middle school principal facilitated by district partners which involved engaging in

literature and deepening the understanding of teacher leadership. The collaboration may

equip middle school principals with an understanding of the role in developing teacher leaders without principals losing time and relying on just personal experiences.

The findings of this study suggest several implications. First, principals must be intentional in selecting and developing teacher leaders, and both principals and teacher leaders should think of their development as a process. The development programs might result in building the principals' knowledge of teacher leadership, and teacher leaders developing their identity as leaders. Positive social change implications might include improving urban middle schools by helping principals understand the need to develop and support teacher leaders. Additionally, positive social change may increase the professional community's effectiveness. Such a change may support the retention of teachers, and the sustainability of the school as well as the improvement of student achievement.

## Conclusion

The purpose of this qualitative case study was to explore the leadership strategies used by middle school principals to develop and support teacher leaders in their schools. Through interviews with middle school principals and review of archival teacher leader training agenda and leadership team meetings, I gained insight of the perspectives and leadership practices middle school principals used to train and guide the development of teacher leaders. The need to value and develop teacher leaders in school remained the center of the middle school principals' actions. Perceptions of teacher leadership, selecting teacher leaders, understanding the role of teacher leaders, cultivating teacher leadership, and building the capacity of teacher leaders were themes that emerged for all

middle school principals in the data analysis. Identifying clear perspectives and the leadership practices that develop teacher leaders were the key findings that emerged. Principals shared their perspective and leadership practices they employed; however, more detailed information concerning the specific practices would enhance the body of knowledge and the issues in practice. With a better understanding of middle school principals' role in fostering a culture of leadership, and the implementation of specific leadership practices, middle school principals have the potential to train and guide the development of teacher leaders, which in return may influence other teachers, surge student achievement, and sustain the development of teacher leaders across schools.

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Appendix A: Interview Guide

Date:
Time
Interviewee Code Number:
Location of Interview:

| Parts of the Interview | Interview Questions and Notes | RQ |
|---|---|---|
| Introduction | • Hi, my name is Ruben Chiza. Thank you for taking the time to participate in this interview today. Just as a reminder, the purpose of this interview is to explore the understanding of middle school principals' role in developing teacher leaders and the strategies to face the challenge of developing teacher leaders. This should last 45-60 minutes. After the interview, I will be examining your answers for data analysis purposes. However, I will not identify you in my documents, and no one will be able to identify you with your answers. You can choose to stop this interview at any time. In addition, I need to you know that this interview will be recorded for transcription purposes. Do I have your consent to record the interview?<br><br>• Do you have any questions?<br>• Are you ready to begin? | • |
| Question 1 | What is your perspective of your role, in guiding and training the development of teacher leaders in your school?<br><br>*Follow-ups:*<br>1. In three words describe your role in developing teacher leaders.<br>2. In your own words, define teacher leadership?<br>3. In what ways have you empowered your staff to develop their leadership skills inside and outside of the classroom?<br>4. What leadership practices do you believe encourage/ cultivate teacher leadership in a school? | |

| Question 2 | What is your process for identifying teacher leaders in your school?<br><br>*Follow up:*<br>1. Is there a formal process to identify teacher leaders in your school?<br>2. Are there specifics characteristics you are looking for when selecting a teacher for leadership role and/or opportunities?<br>3. How do teacher leaders contribute to the success of your school? | |
| Question 3 | What is your experience, as a middle school principal, in guiding and training the development of teacher leaders in your school?<br><br>Follow-up:<br>1. What opportunities have you created at your school for teachers to develop their leadership inside and outside of the classroom?<br>2. Do you offer specific leadership responsibilities and duties or roles to your teacher leaders?<br>3. Tell me what teacher leaders development programs or initiatives have been successful in developing teacher leaders (district or school based)? | |
| Question 4 | How do you support the growth and development of your teacher leaders?<br><br>*Follow-up:*<br>1. Tell me about the needs of your teacher leaders?<br>2. Tell me about what support do you and/or your district offer to develop teacher leaders?<br>3. How do you feel about the overall quality of guidance and training that you provide for teacher leaders in your school?<br>4. Does the district provide you guidance or professional development to support the teacher leader's development in your school? | |
| Close | Thank you for your answers. Is there anything else you would like for me to know or add to your responses? | |

| | Please electronically share your Teacher Leader Training Agenda and Leadership Meeting notes for SY 2019-2020.<br><br>Thank you for your time, have a great day. | |
|---|---|---|

Appendix B: Archival Data Review

**Teacher Leadership Training Agenda**

RQ 1- How do middle school principals perceive their roles and experience in guiding and training the development of teacher leaders in their schools?

RQ 2- What practices do middle school principals identify in guiding and training teacher leaders in their schools?

Participant name (Pseudonym):          School name (Pseudonym):
Date:          Focus of Meeting:
Review of Document:

| | Principal Practices | Comments |
|---|---|---|
| | | **Agenda item's location**: Beginning   Middle   End |
| | | **Agenda item's location**: Beginning   Middle   End |
| | | **Agenda item's location**: Beginning   Middle   End |
| | | **Agenda item's location**: Beginning   Middle   End |

Teacher Leadership Meeting Minutes

RQ 1- How do middle school principals perceive their roles and experience in guiding and training the development of teacher leaders in their schools?

RQ 2- What practices do middle school principals identify in guiding and training teacher leaders in their schools?

Participant name (Pseudonym):           School name (Pseudonym):
Date:                                     Focus of Meeting:
Review of Document:

|  |  | Principal Practices | Comments |
|---|---|---|---|
|  |  |  | **Agenda item's location**: <br> Beginning    Middle     End |
|  |  |  | **Agenda item's location**: <br> Beginning    Middle     End |
|  |  |  | **Agenda item's location**: <br> Beginning    Middle     End |
|  |  |  | **Agenda item's location**: <br> Beginning    Middle     End |