

The Usage of the Southern Regional Education Board (SREB)'s Critical Success Factors in Developing Teacher Leaders to Assume Instructional Leadership Responsibilities

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This study examines the validity of the thirteen Southern Regional Education Board (SREB)'s Critical Success Factors, for use in teacher leader preparation programs, by assessing the extent to which fifteen practicing teacher leaders attribute relevance of the factors to their effectiveness in performing their assigned duties. Additionally, the applicability in supporting practicing teacher leaders in their instructional leadership roles was assessed. Quantitative data was collected using *The Instructional Success Standards and Teacher Leadership Research Survey*. Qualitative data was collected through personal interviews of participants. An analysis of both sets of data revealed that the SREB's thirteen Critical Success Factors are valuable tools in providing a framework for the preparation and development of teacher leaders.

Introduction

American education is faced with perhaps its greatest opportunity and challenge, i.e., implementing standards and accountability measures to ensure that every student reaches his/her full potential. With the emergence of the standards and accountability movement, the general public is demanding more effective schools and with these demands the focus has shifted to school leadership. Evidence suggests the affect of school leadership on student learning is second only to classroom instruction (Davis, Darling-Hammond, LaPointe, & Meyerson, 2005). However, the challenge of leading 21st century schools is so great that no longer is it effective for school leaders to single-handedly provide leadership for school improvement. Instructional leadership practices for today's schools are a distributed entry that is facilitated through human interaction (Green, 2010). It is about leadership practices, rather than leaders or their roles. Therefore, to effectively meet the new challenge fostered by the standards and accountability movement, some school leaders are sharing their leadership role by creating teacher leaders and distributing leadership responsibilities among them.

Also, data show that expert teachers hold the key to student achievement and teacher leadership is strongly influenced by the relationship between teacher leaders and principals (Berry, 2000). Principals are viewed as having the greatest power, and power relationships can transform or maintain the culture and structures of schools. Principals have always *told* their subordinates how to act and teachers have not always had a voice in addressing workplace issues such as the choice of curriculum material, the types of tests used to evaluate instruction, the scheduling of classes, and the allocation of instructional resources. Principals have not had control over their profession on a global level and they lack the control to weed out those who are not qualified to teach (Stokes, Helms, & Maxon, 2003). This lack of autonomy with teachers has affected productivity and commitment to the workplace and has affected their teaching capabilities (Terry, 2000).

Background and Overview of the Study

In examining the existing literature on teacher leadership, the researchers have found that much of the published literature focuses on three aspects of leadership: examples or models, promising practices, and barriers/challenges/issues related to teacher leadership. Although teacher leadership is promoted as a means for supporting instructional leadership, a number of barriers exist which have impacted the effectiveness of teacher leadership models. One challenge involved defining teacher leadership responsibilities and how teacher leaders are utilized in buildings. Other challenges are related to the supervision duties some teacher leaders have been asked to assume (Toll, 2004). If responsibilities are not administrative responsibilities, some duties that teacher leaders perform may seem quasi-supervisory.

In their review of 100 publications about teacher leadership, York-Barr and Duke (2004) found little empirical evidence to support the effects of teacher leadership on student achievement. Their assertions may pertain to the type of research being written about teacher leadership as opposed to the overall effectiveness of teacher leadership models. These authors asserted that additional research was needed about the roles teacher leaders assume which positively impact academic achievement. As a result of the challenges teachers face in implementing teacher leadership roles, the effectiveness of teacher models may be limited. Troen and Boles (1994) discuss the difficulty of institutionalizing leadership roles of teachers due to teacher reluctance to view themselves as leaders, the hierarchical structure of schools, egalitarian and protective nature of teachers about their classrooms, and issues of power. Sintz (2006) stated that there is a great reluctance among many teachers to leave their classroom and assume administrative roles because of the ever-expanding job description of administrators and the stress, demands, and insufficient compensation that is presented.

To address the need for additional research on how teacher leadership impacts academic achievement and maximizing the effects of teacher leader roles, the researchers wanted to examine the notion of using professional standards or competencies as a premise for developing teacher leaders as instructional leaders. Different states have proposed and/or have implemented certification programs for teacher leaders. For example, in the state of Tennessee, the State Department of Education's Instructional Leadership Redesign Commission has proposed that state colleges and universities administer preparation programs implement an advanced teacher leader program leading to teacher leader licensure (Tennessee Department of Education, 2008, see recommendation # 13). Georgia, Illinois, and Louisiana provide optional licensure endorsements in teacher leadership which are performance-based. Peabody College, working collaboratively with officials in Alabama, Delaware, Kansas, Kentucky, and Ohio, has developed a 14-course teacher leadership curriculum (National Boards Association of State of Education, 2009).

For this study, the research purpose was two-fold: determining the validity of Southern Regional Education Board (SREB)'s Critical Success Factors and examining how the use of leadership standards/competencies could structure the development of teacher leaders to impact student achievement through effective instructional leadership. York-Barr and Duke (2004) recommended that future research on teacher leadership address specific areas. They emphasized the following questions as areas for additional research: (a) "How can the work of teacher leaders be *structured to maximize positive effects* on teaching and learning, addressing such issues as maintaining a clear focus on instructional improvement and providing opportunities for job-embedded collegial work?" and (b) "In what ways are *principals influenced and supported* in their roles as instructional leaders through collaboration with teacher leaders?" (p. 292). The purpose of this study was to examine the validity of the SREB's Critical Success Factors for use with teacher leaders and examine the relationship between the SREB's Critical Success Factors and the development of teacher leaders as instructional leaders.

Literature Review of Existing Teacher Leader Models and Practices

Defining Teacher Leadership

The term *teacher leader* as defined by Sintz (2004) embodies a teacher who works outside of the classroom and assumes a leadership role, either in addition to or in place of his or her regular duties. Teacher leaders can function effectively maintaining their role of teacher and expanding it to meet the needs of their students in creative ways. The distributed leadership theory previously mentioned emphasizes that teacher leadership should be one of collective action, empowerment, and shared agency. It is centrally and exclusively concerned with the idea that all organizational members can lead and that leadership is a form of agency that can be distributed or shared (Harris, 2003).

Gronn (2002) fosters a theory of distributive leadership that de-centers the leaders in schools suggesting that with teacher leadership a power relationship exist and the distinctions between followers and leaders tend to blur. He further advocates that leadership is understood as “fluid and emergent, rather than a fixed phenomenon” (Gronn, 2000, p. 324). It involves multiple leaders including those with formal and informal positions and reflects the view that every person in one way or another can demonstrate leadership (Goleman, 2002).

The State of Teacher Leadership in United States Schools

The literature suggests that teacher leaders have been declining in school districts across the country in particular with the number of principals (about 40 percent) who were expected to retire by 2008 and another 66 percent who stated that they planned to retire by 2012. This problem is especially extensive in huge urban areas where administrators’ turnover rates can be as high as 20 percent (Gates, 2003). Those school districts facing the greatest shortages of teacher leaders are those with large percentages of impoverished or minority students (Wallace Foundation, 2003). Hempel found that the teacher leaders never consisted of more than 25% of faculty (Barth, 2001). This problem has prompted many school districts to develop their own programs aimed at developing principal leadership, but despite these efforts, only a small percentage of teachers (9%) reported interest in becoming a principal according to a study by MetLife (Markow & Scheer, 2003). Markow and Scheer (2003) also reported that this reluctance to become teacher leaders, particular at the principalship level, is consistent across grade levels. Several studies pointed to perceptual factors of administrative positions which included being unmanageable, draining, and offering poor monetary compensation (Copland, 2003). As a result, school districts are facing the problem of not having enough qualified leadership applicants and are often forced to fill vacancies with lesser-qualified candidates who have no educational experience (Gates, 2003).

Despite the credentials that prepare teacher leaders for their diverse roles, there are still challenges that may impact their ability to be effective leaders. The literature suggests that teacher leaders need more time to collaborate with each other as well as focus on aspects specific to their leadership role which include improving their self-confidence to act as leaders in their schools. Moller (1999) reported that gaining the confidence and support of the staff was essential in order to maximize growth and development and to create a sense of cohesiveness. More personal challenges for teacher leaders include balancing responsibilities of their families, their own students, and their leadership responsibilities. The pressure of time, the stress of building new relationships with colleagues, the resistance of others to new ideas, and overall support are crucial to prevent the teacher leader from succumbing to these pressures and retreat to the isolation of their classrooms. Even though teacher leadership may bring its own reward through enhanced effectiveness, a sense of collegiality, and improved teaching practices, the literature maintains that it will remain a marginal activity within schools unless forms of remuneration are put in place to actively encourage teachers to engage in leadership tasks.

Teacher Leader Roles and Responsibilities

Day and Harris (2003) postulated that there are four dimensions of the teacher leadership role. The first dimension is the brokering role which is deemed the central responsibility for the teacher leader. This role translates the principles of school improvements into individual classroom practices. The second dimension is a participative leadership role where all teachers feel a part of any change process and have a sense of ownership in the change. The third dimension is the mediating role where the teacher is an important source of expertise and information. The fourth dimension is forming close relationships with individual teachers which foster mutual learning.

Others define teacher leadership roles differently. Katzenmeyer and Moller (2001) discuss the roles of teacher leaders along three main facets: (1) leadership of students or other teachers which include being a facilitator, coach, mentor, trainer, curriculum specialist, creating new approaches, and leading study groups; (2) leadership of operational tasks which include keeping the school organized and moving towards its goals, through roles as department heads, action researchers, member or task forces, and (3) leadership through decision making or partnership which includes membership in school improvement teams, membership in committees, instigator of partnerships with business, higher education institutions, and parent teacher associations.

The research of Lord and Miller (2000) further supports the assertions of Katzenmeyer and Moller (2001) as they postulate that the main responsibilities of teacher leaders can be organized into four main categories: (1) working with individual teachers to support them in their classroom practices; (2) training groups of teachers in professional development settings; (3) working with various school constituents (teachers, administrators, parents, community members, or students) on programs or issues that affect or support learning; and (4) working on other tasks assigned by the principal. In addition, teacher leaders have been employed in schools to assume a number of roles in support of the instructional program and leadership goals of schools. They assume roles as administrators, district leaders, school board members, department chairs, team and grade leaders, and heads of curriculum committees. According to Gordon (2004) these roles can be incorporated into three main models: (1) the lead teacher model, (2) the multiple leadership roles model, and (3) the every-teacher-a-leader model.

When *The Lead Teacher Model* is practiced, teachers assume grade level team leadership or subject area team leadership positions. Responsibilities in this role include advising teachers, staff development, and teacher mentoring. *The Multiple Leadership Roles Model* requires different school level specialists to fulfill distinct leadership roles like those of peer coaches, action researchers, beginning teacher mentors, teacher trainers, and program developer (Gordon, 2004). In *The Every-Teacher-a-Leader Model*, the principal distributes leadership duties and responsibilities to all teachers in a building (Troen & Boles, 1994).

Standards and Teacher Leadership

Some schools are using the expertise of their National Board of Certified Teachers to transform teaching and learning such as those certified from the National Board for Professional Teaching Standards (NBPTS, 2009). Their mission is to advance the quality of teaching and learning by maintaining rigorous standards for what accomplished teachers should know and be able to do. The organization provides a national voluntary system for certifying teachers who meet these standards, and it advocates related education reforms to integrate National Board certification into standards for all teachers as well as capitalize on the expertise of National Board of Certified Teachers (NBPT). The NBPT expects its teachers to lead and serve as role models and is stated to be the most rigorous yet sensible certification source of recent times. Teacher leaders who evolved from this process which is lengthy, costly, and demanding, are recognized on a global scale as embodying all the attributes of top-flight professional teachers. As a result, they receive increased pay and advisory roles as well as become role models for their colleagues (NBPTS, 2009).

Additionally, the NBPTS offered a teacher leadership development strand, referred to as *Leading beyond the Classroom*, as one of its five core competencies for the 2009 annual conference. Other states have crafted state-level standards for instructional leadership for use by teachers and administrators.

Limited Validation

Despite the many different roles and functions appearing in the literature that describe what leaders should know and be able to do, few studies, if any, have been conducted to validate standards and accountability measures that inform practice. Among noted accountability measures are the SREB's 13 Critical Success Factors (see Appendix A) and the Interstate School Leader Licensure Standards (ISLLCS). Whereas the critical success factors as well as the ISLLCS offer strong guidance to institutions in the preparation of leaders, little or no evidence appears in the literature that offer validation of these measures. O'Neill (2009) commented that beyond the work done by SREB, the critical success factors have not been validated (K. O'Neill, SREB director, personal communication via email, March 18, 2009). In an effort to reduce the void that exists in the literature, a study was conducted with the intent of validating one set of standards, the SREB's Critical Success Factors (see Appendix A). This study examined 15 teachers who progressed through a leadership preparation program while functioning in leadership roles at various levels. Therefore, these researchers asserted that additional research was needed about leadership in general and specifically the roles teacher leaders assume which positively impact academic achievement.

Research Design and Methods

The Purpose of the Study

The purpose of this study was to examine the validity of the Southern Regional Education Board (SREB)'s Critical Success Factors for use with teacher leaders and examine the relationship between the SREB's Critical Success Factors and the development of teacher leaders as instructional leaders. The specific intent was to assess the extent to which participants attribute relevance of the SREB's Critical Success Factors to their effectiveness as teacher leaders. The researchers sought answers to the following questions:

1. Are the SREB's Critical Success Factors appropriate standards to use in the development/preparation of teacher leaders?
2. Is there a relationship between the SREB Critical Success Factors and the duties teacher leaders perform?
3. Are the SREB's Critical Success Factors important in guiding the work of teacher leaders?

Participant Selection

Purposeful sampling for this mixed methods pilot study was utilized to determine the research participants who were graduate students enrolled in a principal preparation cohort for teacher leaders at a southeastern state university. In order to participate in the program, the educators had to receive recommendations from building and district-level administrators, complete an interview with a panel of practitioners and university professors, complete a writing sample, and participate in a leadership simulation. All participants were public school teachers, administrators, and central office employees who were obtaining principal certification and held teacher leadership responsibilities. A total of 15 participants were involved in the study with some teachers assuming teacher leadership responsibilities while in roles as teachers or administrators. Other participants held formal teacher leader positions such as designated teacher leadership positions based on their official contractual position. Concerning years of experience, nine were mid-year professionals having four to nine years of teaching experience. Six had 10 or more years of teaching experience. In terms of the job titles they assumed in their K-12 positions, five of the participants were practicing classroom teachers. One became an assistant principal while completing the program. Three of the teacher leaders were central office coordinators. Four participants

held formal teacher leadership positions at the building level; three are Professional Development School Compliance Coordinators (PDSCC), and an instructional facilitator. One participant only indicated *other* as the designated role (see Table 1).

Table 1
Participant Experience Profile

<i>Participant</i>	<i>Teaching Experience</i>	<i>Teaching Endorsement</i>	<i>Grade Level</i>	<i>Position</i>
1	Mid Year	1-8	2	Teacher All Subjects
2	Mid Year	K-8	6	Sc LA Teacher
3	Mid Year	PreK-4	1	Teacher All
4	Veteran	K-6	K-6	Reading Teacher
5	Veteran	7-12	9th-12th	PDSCC
6	Veteran	K-8	6th-8	PDSCC
7	Mid Year	1-8	K-6	Instructional Facilitator
8	Mid Year	K-8	PreK-5	PDSCC
9	Veteran	7-12	Middle AP	Assistant Principal
10	Mid Year	7-12	Middle CO	Central Office Supervisor
11	Veteran	K-8	Middle CO	Central Office Supervisor
12	Mid Year	7-12	9-12	Other
13	Mid Year	7-12	9-12	English/Literacy Coach
14	Veteran	K-8	Middle CO	Language Arts
15	Mid Year	K-8	6	Science

A majority of the teachers (10) worked in an urban metropolitan public school district. One participant worked in a suburban county school district that surrounded the urban metropolitan district. Three participants worked in rural county districts surrounding the urban metropolitan district. One participant worked in a rural school district located about 60 miles from the urban metropolitan district. Each district had student populations with ethnic diversity, students with disabilities, economically disadvantaged students, and Title 1 students (see Table 2).

Table 2
Demographic Profile of Teacher Leader School Districts

<i>District</i>	<i>Minority Student Population</i>	<i>Students with Disabilities</i>	<i>Economically Disadvantaged Students</i>	<i>Title 1</i>
Urban Metropolitan District	92.80%	15%	79.60%	94.40%
County District 1	44.80%	16%	30.1	10.5
County District 2	64.50%	15.10%	78.80%	98%
County District 3	27.90%	15%	52.70%	46.60%
County District 4	70.20%	16.60%	81.00%	68.10%

Source: Tennessee Department of Education, 2008

Data Collection and Analysis

The researchers developed the *Instructional Success Standards and Teacher Leadership Research Survey* (see Appendix A) to determine the validity of SREB's Critical Success Factors for use in the preparation of teacher leaders and to examine the relationship between the SREB's Critical Success Factors and the development of teacher leaders as instructional leaders. According to SREB (2008), "Through literature reviews and research data from its own school reform initiatives, SREB has identified 13 Critical Success Factors (CSFs) associated with principals who have improved student achievement in schools with traditionally 'high risk' demographics" (p. 2). According to SREB, the development of the factors was based on a five-part process. Initially, SREB conducted a review of the research on practices that promoted school improvement in low-performing schools. Secondly, SREB convened a sampling of its *High Schools that Work* principals who had success in raising academic achievement to explore *essential* guiding questions. Third, SREB gathered a national panel to solicit perspectives on the research and responses to the essential questions. Fourth, a panel of exemplary principals who worked in schools with diverse and low performing populations met to discuss actions they took to improve student achievement. Lastly, they presented their guiding questions during SREB convened groups of university professors, school leaders, professional associations, state legislators, and business leaders (SREB, 2001). These steps were used to conceptualize the CSFs.

Currently, no external studies have been conducted to validate these factors/standards as verified with the Director of the Learning-Centered Leadership Program (K. O'Neill, personal communication via email, March 18, 2009). The researchers selected the standards to validate their use with teacher leaders since SREB asserts these factors are associated with principals who have improved student achievement. At the time of the study, the factors had not been validated by principals or teacher leaders, yet they were designed based on the literature on effective school leadership for student achievement and SREB's internal research on this topic.

Also, the Critical Success Factors are embedded in the initiatives of SREB's Learning-Centered Leader Program. One initiative of this program is tracking progress of SREB's member states along seven indicators of improved school leadership. Three of the indicators relate to preparing future leaders. These indicators reference selection and recruitment of leaders, redesign of leadership programs to emphasize instruction and learning, and field-based experiences that foster school improvement (SREB, 2008).

The *Instructional Success Standards and Teacher Leadership Research Survey* instrument (see Appendix B) requests demographic information, completion of a Likert-type evaluative scale on the importance and meaningfulness of each factor in guiding the work and fulfilling the responsibilities of teacher leaders. Additionally, the participants responded to qualitative research questions about the roles they complete as teacher leaders and how the CSFs support or conflict with their roles (see Appendix A). The primary researcher invited participation in the research study by attending a class meeting of the students who participated in a leadership licensure cohort for teacher leaders. This researcher described the research study, distributed the consent form, and invited participation. Participants were informed of their option to decline or participate in accordance with federal and university human rights protections. Participants completed a survey on their roles and the SREB standards.

Results

The quantitative aspect of the study addressed the weight teacher leaders assigned to the importance or relevance of the Critical Success Factors. In this section, the results are separated by these two areas. The qualitative aspects of the study addressed the responsibilities teacher leaders assumed either at the building or district level.

Quantitative Results

To address the first research question, “Are the SREB’s Critical Success Factors appropriate standards to use in the development/preparation of teacher leaders?” and question two, “Is there a relationship between the SREB’s Critical Success Factors and the duties teacher leaders perform?”, the researchers assessed the weight participants assigned to the importance or relevance of the CSFs using the Instructional Success Standards and Teacher Leadership Research Survey (ISSTLRS). The ISSTLRS contained a Likert-type scale asking respondents to measure if the critical success factor is important to the work of teacher leaders as well as how meaningful it is to the work of teacher leaders. The importance scale ranged from very important to unimportant. The importance rating pertained to whether or not the standard held a major role that teacher leaders should perform. The meaningfulness scale ranged from very meaningful to irrelevant meaning. The relevance of the meaning of the factors with teacher leaders addressed the relationship between the CSFs and the work teacher leaders perform. The scales containing the four areas for rating importance and meaning are provided below (see Figure 1).

Figure 1

Coding Legend

Coding for Importance	Coding for Meaningfulness
VI = Very Important	VM = Very Meaningful
I = Important	M = Meaningful
SI = Somewhat Important	SM = Somewhat Meaningful
U = Unimportant	IM = Irrelevant Meaning
NRI = Not Rated for Importance	NRM = Not Rated for Meaning

The table below shows the number of participants who selected each rating for the importance or meaningfulness of each critical success factor (see Table 3). Additionally, if a participant did not mark a response as important or meaningful, those classifications are included as well.

Table 3

Number of Responses Indicating Critical Success Factors (CSF) Importance and Relevance

CSF	VI	I	SI	U	VM	M	SM	IM	NRI	NRM
CSF 1	14	1			11					4
CSF 2	15				11	1				3
CSF 3	13	1			12				1	3
CSF 4	13	1			11	1			1	3
CSF 5	13	1			7	3			1	5
CSF 6	12	3			7	4				4
CSF 7	10	4			9	4			1	2
CSF 8	12	2	1		5	4	1			5
CSF 9	9	6			5	5	2			3
CSF 10	8	5	1		5	4	1		1	5
CSF 11	12	2			5	5			1	5
CSF 12	10	2			6	7			3	2
CSF 13	11	4			7	3	1			4

Over 50% of the participants felt that all of the CSFs were very important for teacher leaders to perform. Ninety three percent of the participants believed all CSFs were important or very important. For CSFs 1-6, 8, and 11, 80% of the participants view the factors as very important. CSFs 3-5, 7, and 10-11 were not rated at all for importance for one occurrence. CSF 12 was not rated at all for importance by three participants. Thirty-three percent (33%) of the participants felt all of the CSFs were very meaningful for teacher leaders to perform. Eighty-seven percent of the participants believed all CSFs were meaningful or very meaningful. For CSFs 1-4, over 70% of the participants view the factors as very meaningful. CSFs 5, 8, 10, 11 were not rated at all for meaning by five participants. One CSF was not rated at all for meaning by three participants. This factor was *implementing data-based improvement*. A graphic description of these findings appears in Table 3 (above).

Qualitative Results

The qualitative results show teacher leader roles are diverse and utilized in a number of ways which support the needs of the individual school buildings where they are employed. The majority of the teacher leaders assumed responsibilities that were directly related to improving academic achievement. The responses from the qualitative questions are included in Appendix C and are divided into key concepts that emerged as well as the critical success factor that each finding related to. Analysis of the qualitative responses revealed information to address all three of the guiding questions. The majority of the participants reported that they assumed responsibilities that were directly related to improving academic achievement. Three key themes emerged:

1. Roles and responsibilities of teacher leaders (i.e., teaching and leadership related),
2. SREB's Critical Success Factors supports the roles of teacher leaders, and
3. SREB's Critical Success Factors are challenging to accomplish in teacher leader roles.

Discussion

This study illuminates the value of teacher leaders in supporting the leadership and teaching efforts in a school and validates the use of the SREB's Critical Success Factors (CSFs) as indicators to be used in the development of teacher leaders. The discussion of the findings has been divided into two areas: quantitative and qualitative.

Quantitative Analysis

Analysis of quantitative responses show that over 50% of the participants felt all of the CSFs were very important for teacher leaders to perform. Ninety-three percent of the participants believed all CSFs were important or very important. For CSFs 1-6, 8, and 11, 80% of the participants view the factors as very important. Critical Success Factors 3-5, 7, and 10-11 were not rated at all for importance for one occurrence. CSF 12 was not rated at all for importance by three participants. These findings from the analysis show the validity of the critical success factors as important for teacher leaders (see Table 3 above).

Analysis of quantitative responses show that 33% of the participants felt all of the CSFs were very meaningful for teacher leaders to perform. Eighty seven percent of the participants believed all CSFs were meaningful or very meaningful. For CSFs 1-4, over 70% of the participants view the factors as very meaningful. CSFs 5, 8, 10, 11 were not rated at all for meaning by five participants. One CSF was not rated at all for meaning by three participants. This factor was *Implementing Data-based Improvement*. These findings from this analysis show the validity of the critical success factors as meaningful to the work of teacher leaders (see Table 3 above).

Qualitative Analysis

The responses of the participants centered around three key themes: (a) roles and responsibilities of teacher leaders (i.e. teaching and leadership related), (b) Critical Success Factors supporting the roles of teacher leaders, and (c) Critical Success Factors are challenging to accomplish in teacher leader roles. Any comments provided by actual participants are written in the exact words of the respective teacher leader.

Roles and Responsibilities of Teacher Leaders

Participants indicated that the roles they assume most often relate to using data, providing professional development services to teachers, and enhancing school-wide instructional improvement. In fulfilling those roles, they reported that it is most important for them to be able to collaborate, coordinate, and communicate with individuals inside and outside of the schoolhouse. In a variety of wordings, all participants stated that a part of their role was to collaborate and coordinate programs and activities with stakeholders inside and outside of the school. Twelve teacher leaders stated professional development held a major role. Nine participants discussed their teacher leader duties required them to disaggregate, analyze, and use data to inform instructional improvement. All teacher leaders in the study mentioned they were required to identify strategies for school-wide instructional improvement. A few (three) participants mentioned they served as a parent/community liaison and two served as substitute administrators in the absence of the principal. Other duties mentioned included: using educational technology, serving as grade chair or team leader, and serving as resources, mentoring and providing support to teachers.

Participant #13, a high school English teacher, stated, *“I am a literacy coach. My job is to support the principal and PDSCC [Professional Development School Compliance Coach] in professional development for the teachers. I am responsible for training teachers in literacy strategies, and the SDIS model. Data analysis and helping teachers plan according to the standards and SPIs [state performance indicators] are extremely important. I also work with students who have not passed the Gateway Assessment. I provide tutorials for students who will take the ACT/SAT.”*

Participant #8, an elementary teacher, wrote, *“As a PDSCC, I am responsible for professional development, ensuring the school is in compliance with NCLB, function in the role of the principal in her absence, serve as testing coordinator, and work with the community leaders and parents to increase achievement for students.”*

These examples demonstrate the myriad of duties teacher leaders perform in schools. These duties are diverse and specific to the individual school. What is clear is that teacher leaders assume demanding roles that require sufficient resources to support student achievement. The teachers are called upon to provide instructional leadership to support curriculum and achievement in the schools. Additionally, roles were further explored along two dimensions: relationship to leadership and relationship to teaching.

Roles Related to Leadership

The data clearly revealed that the leadership role of teacher leaders is centered on instructional improvement. Teacher leaders in the study perform a number of other activities; however, their primary role is instructional improvement. Effective communication and coordination are also critical factors in this process. Although not mentioned directly by all participants through listing the *actual* number of the factor, all of the teacher leaders mentioned their leadership duties entailed communicating and coordinating projects and activities in addition to instructional improvement. Five teachers commented that use and analysis of data were included in leadership responsibilities as well as providing professional development/leading meetings. Four mentioned assuming the duty as lead administrator in the absence of the principal. A few mentioned increasing parental involvement as a duty (three), budget management (two), and student motivation (one).

Participant #5, a high school PDSCC, wrote, “*Many of the duties that I do in this capacity are aligned with future leadership responsibilities. I collaborate with community members; model/observe instructional practices; clearly communicate a vision for various programs that are aligned with the school’s vision. Continually analyze data to determine who I research best practices will positively affect student achievement. I also promote leadership in various programs such as supervision of the academic coaches and the parent counselor.*”

Participant #13, a high school English teacher, stated, “*I am responsible for professional development and teacher training. I hold departmental and bimonthly meetings with the English Department. I observe teachers and provide feedback for coaching purposes.*”

Roles Related to Teaching Duties

When considering the role teacher leaders play relative to teaching, their most noted role was developing opportunities to increase student motivation and achievement. Additionally, working cooperatively and completing professional development experiences surfaced as a major teaching responsibility. These duties encompass creating and implementing lesson plans and working collaboratively with teachers during professional development experiences. Other areas surfaced as being aligned with teaching responsibilities. A summary of the responses along with the number of participants providing the responses follows:

1. Communicating with external and internal stakeholders (1)
2. Presenting data and other information (5)
3. Using up-to-date technologies (3)
4. Working collaboratively during professional development experiences (8)
5. Developing opportunities to increase parental engagement (1)
6. Developing opportunities to increase student motivation and achievement (Lesson Planning) (8)
7. Procurement of resources for student learning (2)
8. Developing strategies to improve academic achievement of low performing students (5)
9. Creating instructional plans of action to motivate student achievement (1)
10. Teacher mentoring (4)
11. Being the instructional leader in the classroom (1)
12. Sponsoring club or other extra-curricular activities (1)
13. Serving on school committees (1)

Participant #1, a self-contained second grade teacher of all subjects, listed her teaching responsibilities that were aligned with teacher leadership. These included: “*(a) communicating with external and internal community stakeholders, (b) presenting data/information in a variety of contexts, (c) using up-to-date technologies, (d) working collaboratively during professional development experiences, (e) developing opportunities to increase parental engagement, student motivation and achievement, (f) procurement of resources for student learning, (g) developing strategies to improve academic achievement of low performing students, and (h) creating plan of action so that students stay on the upsurge and not regress.*”

This teacher’s responses show the extensive level teacher leaders play in supporting instructional improvement. This teacher assumed key responsibilities in improving academic achievement in her building. The importance of supporting achievement was reiterated with the teacher leaders.

Critical Success Factors Supporting the Roles of Teacher Leaders

The examples mentioned most often as to how the 13 critical success factors support the role of teacher leaders related to implementing the vision/mission, creating and implementing professional development programs and activities, identifying instructional best practices, providing training to motivate students, and promoting data driven instruction. The data evidenced that the following 13 CSFs add to, support, and direct the role that teacher leaders play in schools (see Appendix C).

Participant #2, a sixth grade science and language arts teacher, referenced CSF 3 and 11. For CSF 3, she wrote, *“I teach an inclusion class (science) where students have different learning styles & abilities. I understand the importance of children grasping information where they feel successful because they understood.”* Regarding CSF #11, she wrote, *“Resources are often limited so whatever I have access to I make sure I use it to benefit the entire group.”*

Critical Success Factor 3 relates to establishing a standards-based instructional system. CSF 11 relates to using resources effectively. Her responses illuminate the need for standards to ensure all students are learning the information including students with disabilities. Also, resources are limited so educational leaders have no choice but to effectively manage all resources.

Critical Success Factors as Challenges to Teacher Leader Roles

Almost half (47%) of the participants did not respond to this question or perceive the 13 CSFs to be a conflict with their role. Of those responding, reported areas of possible conflict were lack of understanding of data usage, difficulties in effectively utilizing data; lack of parental support, territorial behavior of teachers, balancing opinions and ideas; being empowered to take action, and balancing classroom duties with leadership responsibilities. Of factors specifically mentioned, CSFs 5, 7, and 13 were mentioned only once by two participants. In comparing the responses to the validation scale for the quantitative portion of the instrument, five participants did not rate CSF 5, *Implementing Data-based Improvement*, for meaning. One participant did not rate it for importance. The standards as well as the competencies they relate to can be found in Appendix A.

Participant #2, a middle school science and language arts teacher, perceived CSF 7 which relates to parental involvement as hard to accomplish at her school site even when having good intentions or rapport. She wrote: CSF #7 – *“Parental support is such a struggle at my school. It’s hard to get students to be responsible for their outside learning when there’s no parental support at home. My doors are always open to my parents. I’m just waiting for them to come right in for the success of the child.”*

Participant #6, a middle school Professional Development School Compliance Coach, believed that all CSFs were supportive of teacher leader roles yet she noted another challenge. She wrote: *“There are no conflicting factors. However in my role, time does not allow for continued opportunities in developing partnerships with parents and there are limitations in my opportunities to communicate with central office.”*

Participant #9, a middle school assistant principal, mentioned the challenges related to CSF 13, *Staying Abreast of Effective Practices* and CSF 5, *Implementing Data-based Improvement*. She wrote, CSF13 – *“Often times teachers are territorial and do not like to share information with other colleagues that would benefit student achievement.”* CSF 5- *“Teachers (some) do not understand the importance of data and why it drives instruction. Data Training and how to use, interpret and analyze would be beneficial so that teachers see the ‘entire’ picture.”*

Participant 14, a central office middle school coordinator, wrote: *“The conflict that I experience as a leader is looking at the data from the district and paying close attention to all the subgroups in our district. Although I have high expectations for all students, our Special Education population continues to lag behind.”*

These teacher leaders mention the realities that exist in fully being able to address all the critical success factors. Parental participation is a desired goal. Also, ensuring that teachers *embrace initiatives is challenging*. These examples do not necessarily imply that the CSFs *cannot* be mastered or accomplished, but the contexts within which the teachers operate require additional work in achieving the CSFs at an acceptable level.

When some CSFs were challenging and others were directly related, teacher leaders’ roles were varied in specific responsibilities, yet instrumental in supporting the academic achievement of students in the schools. Beyond acknowledging the CSFs as a means of supporting teacher leader development, these instructional leaders need support from administrators and other teachers through capacity building.

The results of this study can be used to validate the SREB's CSFs as indicators to be used in the development of teacher leaders. Teachers will also need additional support when assuming responsibilities for the greatest level of effectiveness. Providing standards-based development and resources to facilitate the actualization of the standards can give teacher leaders the support they need to effectively perform their roles and duties.

Limitations of the Study

This study was limited to public schools in the state of Tennessee. Information was obtained from 15 participants who had progressed through a leadership preparation program. Participants were functioning in leadership roles as public school teachers, administrators, and central office employees. All participation in the study was voluntary.

Only one instrument, the *Instructional Success Standards and Teacher Leadership Research Survey*, was used to collect quantitative data and the results reported were based on the perception and opinions of participants. There were no controls for opinions and/or perceptions. Definitions and meanings given the Critical Success Factors were those embedded in the initiatives of the SREB's Learning-Centered Leader Program.

Conclusion

In conclusion, an analysis of both sets of data revealed the SREB's 13 CSFs are valuable tools in provide framework for the preparation and development of teacher leaders. This premise was substantiated through examining the quantitative and qualitative data. Since the pilot study has revealed positive results, the next phase of the research will involve continuing this work on a broader level with larger sample sizes. SREB's CSFs are valuable tools in providing a framework for the preparation and development of teacher leaders. Since there is not a common set of standards teacher leaders can use, it seems feasible to use the critical success factors based on the results of this pilot study. Whether teacher leaders remain in the current positions or assume principalships, they can receive better preparation for those roles by following a set of standards.

Standards-based preparation of teacher leaders can address assertions questioning the value of teacher leadership. Noting York-Barr and Duke's (2004) findings regarding the need for research-based findings on teacher leadership and student achievement, using a set of standards can serve as the foundation for studying and expanding this work. After using a set of standards to prepare teacher leaders, researchers can examine the impact of their work on student achievement. Evaluating teacher leaders without ensuring sufficient preparation does not adequately allow for measuring their impact on academic achievement nor does it provide them the capacity to make an impact. Furthermore, given the complexities of teacher leadership roles as well as the varying indicators of what is successful teacher leadership, a standards-based approach is warranted and apropos.

The findings of this research demonstrate the value of using standards to prepare teacher leaders. The teacher leaders who participated in the study believed the CSFs were important and relevant to their work. As a result of these findings, districts and schools should provide adequate development of teacher leaders using a common set of competencies and benchmarks. This work can be facilitated through the use of the Critical Success Factors.

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Appendix A

SREB Competencies and Critical Success Factors

Competency I: Effective principals have a comprehensive understanding of school and classroom practices that contribute to student achievement.

CSF 1. Focusing on student achievement: creating a focused mission to improve student achievement and a vision of the elements of school, curriculum and instructional practices that make higher achievement possible.

CSF 2. Developing a culture of high expectations: setting high expectations for all students to learn higher-level content.

CSF 3. Designing a standards-based instructional system: recognizing and encouraging good instructional practices that motivate students and increase their achievement.

Competency II: Effective principals have the ability to work with teachers and others to design and implement continuous student improvement.

CSF 4. Creating a caring environment: developing a school organization where faculty and staff understand that every student counts and where every student has the support of a caring adult.

CSF 5. Implementing data-based improvement: using data to initiate and continue improvement in school and classroom practices and in student achievement.

CSF 6. Communicating: keeping everyone informed and focused on student achievement.

CSF 7. Involving parents: making parents partners in students' education and creating a structure for parent and educator collaboration.

Competency III: Effective principals have the ability to provide the necessary support for staff to carry out sound school, curriculum and instructional practices.

CSF 8. Initiating and managing change: understanding the change process and using leadership and facilitation skills to manage it effectively.

CSF 9. Providing professional development: understanding how adults learn and advancing meaningful change through quality sustained professional development that leads to increased student achievement.

CSF 10. Innovating: using and organizing time and resources in innovative ways to meet the goals and objectives of school improvement.

CSF 11. Maximizing resources: acquiring and using resources wisely.

CSF 12. Building external support: obtaining support from the central office and from community and parent leaders for the school improvement agenda.

CSF 13. Staying abreast of effective practices: continuously learning from and seeking out colleagues who keep them abreast of new research and proven practices.

Appendix B Instructional Success Standards and Teacher Leadership Research Survey

I. Demographic Information

1. Teaching Status A) Novice (e.g. 1-3 years) B) Mid Year (e.g. 4-9) C) Veteran (e.g. 10 or more)	2. Gender A) Male B) Female 3. Age _____	4. Race/Ethnicity A) African American B) Asian/Pacific Island C) Caucasian D) Hispanic E) Native American F) Other _____
5. Area of Teaching Certification A) Pre-K B) K-4 C) K-8 D) K-12 E) 7-12 F) Alternate Route G) Emergency H) Other _____	6. Grade Level (s) you are currently teaching _____	7. Subject Discipline you are teaching - <u>Course Name if teaching middle/high school</u> A) Math _____ B) Science _____ C) Social Studies _____ D) Reading _____ E) English _____ F) Music _____ G) Art _____ H) All Subjects _____ J) Other _____
8. Highest Degree Level A) AA B) BA C) BS D) M. Ed. E) Ph. D. F) Ed. D. G) Other _____	9. a) Undergraduate Degree Institution	10. a) College Granting Highest Degrees (for Masters and/or above)

II. Validation Scales

A. Rate the importance of each of the 13 Critical Success Factors to guiding your work and fulfilling your duties and responsibilities *as a teacher leader*. Rate whether addressing the factor is important as well as how meaningful it is to your work as a teacher leader.

The SREB Critical Success Factors for Principals	VI = Very Important and VM = Very Meaningful	I = Important and M = Meaningful	SI = Somewhat Important and SM = Somewhat Meaningful	U = Unimportant and IM = Irrelevant Meaning
1. Create a focused mission to improve student achievement and a vision of the elements of school, curriculum and instructional practices that make higher achievement possible.				

2. Set high expectations for all students to learn high-level content.				
3. Recognize and encourage implementation of good instructional practices that motivate and increase student achievement.				
4. Create a school organization where faculty and staff understand that every student counts and where every student has the support of a caring adult.				
5. Use data to initiate and continue improvement in school and classroom practices and student achievement.				
6. Keep everyone informed and focused on student achievement.				
7. Make parents partners in their student's education and create a structure for parent and educator collaboration.				
8. Understand the change process and have the leadership and facilitation skills to manage it effectively.				
9. Understand how adults learn and know how to advance meaningful change through quality sustained professional development that benefits students.				
10. Organize and use time in innovative ways to meet the goals and objectives of school improvement.				
11. Acquire and use resources wisely.				
12. Obtain support from the central office and from community and parent leaders for the improvement agenda.				
13. Continuously learn and seek out colleagues who keep them abreast of new research and proven practices.				

III. Narrative Response – Please respond to questions below and use additional paper as needed.

1. Describe your roles as a teacher leader. What are your duties?
2. What teacher leader duties are directly aligned with leadership responsibilities?
3. What roles are aligned with teaching responsibilities?
4. In your role as teacher leader, provide examples of how the 13 Critical Success Factors support your role as a teacher leader (if supporting).
5. Provide examples of how the 13 Critical Success Factors conflict with your role as a teacher leader (if conflicting).

Appendix C

Analysis of Instructional Success Standards and Teacher Leadership Research Survey Qualitative Results Questions 1-5

Questions	Key Concepts/Programs/Activities	Related Critical Success Factors
Describe your role as a teacher leader. What are your duties?	Collaborate; Coordinate; Professional Development; Data Usage; Identification of Instructional Strategies; Instructional Improvement, and Leadership	4, 5, 6, 8, 9, 10, 11, 12, 13
What teacher leader duties are directly aligned with leadership responsibilities	Communication; Data Analyze; Instructional Improvement; Professional Development; Parental Involvement; Student Motivation; General Leadership, and Budget Management	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13
What roles are aligned with teaching responsibilities?	<ul style="list-style-type: none"> • Communicating with external and internal stakeholders; • Presenting data and other information (5); • Using up-to-date technologies (3) • Working collaboratively during professional development experiences (8); • Developing opportunities to increase parental engagement; • Developing opportunities to increase student motivation and achievement (Lesson Planning) (8); • Procurement of resources for student learning (2); • Developing strategies to improve academic achievement of low performing students (5); • Creating instructional plans of action to motivate student achievement; • Teacher mentoring (4); • Being the instructional leader in the classroom; • Sponsoring club or other extra-curricular activities, and • Serving on school committees 	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13
In your role as teacher leader, provide examples of how the 13 Critical Success Factors support your role as a teacher leader (If supporting)	<ul style="list-style-type: none"> • Providing a focused Mission/Vision; • Providing focused professional development and support services; • Believing in the ability of all students to learn; • Identifying best practices; • Utilizing data; • Working with adult stakeholders 	1, 2, 3, 4, 5, 6, 7, 8, 10, 11
Provide examples of how the 13 Critical Success Factors conflict with your role as a teacher leader (If Conflicting)	<ul style="list-style-type: none"> • Lack of understanding of data usage; • Effectively utilizing data; • Lack of parental support; • Territorial behavior of teachers; • Balancing opinions and ideas; • Being empowered to take action, and • Balancing classroom duties with leadership responsibilities 	5, 7, 8, 13