

Running Head: DEVELOPING TEACHER LEADERS

**Developing Teacher Leaders for Social Justice:
Building Agency Through Community, Critical Reflection and Action Research**

by

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Abstract

This study responds to the critical question: How could I as an educational leader in Manitoba improve educational outcomes for students who are the least privileged in society? I envisioned a leadership development program which would enhance the ability of teacher leaders to facilitate change from within schools. This critical action research study aimed to: 1) identify the knowledge, skills and dispositions teacher leaders required to be agents of change in educational contexts; 2) identify the learning processes that developed agency; and 3) determine the impact of a co-constructed community on teachers who participated in the leadership development program.

As a participant-researcher I facilitated six full-day leadership development sessions with a cohort of nine teacher leaders committed to social justice. Qualitative data sources which captured the processes influencing teacher leader development included: videotapes of focus groups and leadership development sessions; participants' and researcher's written reflections, journals and action research cycles; pilot test feedback forms, self-assessment and peer reflection instruments; audio-recorded mentoring conversations; and curricular and design process notes. Data analysis was ongoing, cyclical and reflexive; it included content and thematic analysis, "themeing" (Saldaña, 2013, p. 175), and crystallization across multiple sets of data.

Research outcomes include the creation of the Social Justice Teacher Leadership Self-Assessment (SJTLSA) and Peer Reflection (SJTLPR) tools offered for use in various educational contexts to promote self-knowledge, reflection and dialogue. A theory-in-context is proposed which synthesizes the knowledge, skills, dispositions and agency of teacher leaders for social justice. Seven elements were found to promote

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critical reflection and agency of teacher leaders: action research, learning-focused conversations, dialogue, self-assessment, peer feedback, journals and critical reflection. The co-constructed community contributed to participants' feelings of acceptance, validation, belonging and challenge. A three phase modular leadership development model is proposed which summarizes the design, enactment and outcomes of the leadership development sessions. Positive outcomes for teacher leader participants were transformative experiences, frameworks for action and a community to support sustained engagement. The iris is used metaphorically to describe the catalytic potential of the leadership development sessions. Implications of the study for teacher leaders, facilitators of adult learning, theory and future research are identified.

Key words: teacher leaders, social justice, agency, critical reflection, action research, community

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Dedication

I would like to dedicate this dissertation to my family whose constant support and interest in this research has sustained me through to completion:

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Chapter One: Introduction and Overview

One of the paradoxes of Kindergarten to Grade 12 educational systems is that they perpetuate inequities. Apple (2004) purports that schools, although touted as great equalizers, actually reinforce and reproduce existing class differences. Poverty studies indicate repeatedly that student outcomes correlate closely with the socio-economic status of the learner's family (Connel, 1994; Gaskell & Levin, 2012). Therefore, a student whose personal profile does not match that of the dominant culture, in any combination of attributes, is likely to be at a disadvantage in the educational system. Diversifying the teaching profession increases the responsiveness of schools to variations in our student population. In addition, teachers are becoming increasingly skilled at implementing differentiated instructional strategies to meet the needs of individual students. Yet, despite these encouraging shifts, this gap in the likelihood of success remains alarmingly consistent, and factors such as socio-economic status continue to be effective predictors of student success in schools.

Changing educational practice to address issues of systemic inequities is imperative. If we do not respond critically to this crisis and persist in creating inequities, we deprive society of the potential contributions of currently marginalized populations. We must do a better job of supporting all learners to achieve the highest possible levels of academic and personal success. To achieve this goal, we must increase our ability to identify and address inequities in the educational system and adjust our practices until student achievement can no longer be predicted by where a student lives, the student's background or what language she speaks. To be meaningful, sustainable and effective, change in the educational system needs to come in response to pressures from within and

outside of the system. As educators, we need to get better at identifying gaps in students' achievement. We need to be curious and reflective about our practice, identify action-oriented change strategies to address these inequities, and persist with innovation until we narrow the gaps in student achievement.

To facilitate these practices, it can be argued that all schools need individuals who can be internal agents serving as catalysts for change in pursuit of social justice. Social justice entails the removal of all barriers and provision of necessary supports to ensure all individuals can benefit from, participate in, and contribute to the local and global community. Internal change agents work from within the system as knowledgeable and trusted colleagues to promote and provoke the kind of reflective and creative thinking required to bring about incremental and eventually systemic change. Sustainable change in practice requires an ongoing commitment to reflective practice and a critical, action-oriented approach.

This dissertation is designed to address these concerns. It is my response to the critical question: how can I as an educational leader most effectively influence change in Manitoba schools to improve educational outcomes in schools for those students who are the least privileged in society? My vision is to create a leadership development program which will enhance the ability of teacher leaders to lead for social justice from within educational systems. The potential for change, through a research-based approach to leadership development, has support from within Manitoba's educational community. Alan Schroeder (Personal communication, September 30, 2011), then Chairperson for the Council of School Leaders (COSL) of the Manitoba Teachers' Society (MTS), suggests, "Linking research with practice within a realm of developing and extending leadership

capacity seems the logical and ‘common sense’ path to bettering education in Manitoba”. This leadership development program would develop the kind of change agents schools need to tackle issues of social justice on an ongoing basis with colleagues, students, parents and administrators. Building the capacity of school-based teacher leaders to address issues of inequity in schools, in collaboration with other concerned adults in their school communities, will result in sustainable, creative and meaningful change. Based on this assumption, identifying a leadership development model for strengthening teacher leaders’ abilities to lead for social justice has the potential, over time, to increase equitable practices in every school in Manitoba. Before I lay out the design of my dissertation, in the next section I outline personal experiences which have contributed to my research interest in developing teacher leaders for social justice as a change strategy to address inequities in the school system. This autobiography substantiates my personal connection to the research and my commitment to specific learning processes.

Autobiographical Background to the Study

In some ways I could say that I have been approaching this dissertation focus on strengthening teachers’ leadership capacity for social justice for the last forty years. As I reflect on my life, I realize my informal and formal learning experiences have shared elements of leadership development and social justice, primarily within the context of education. My life history and now my dissertation, reflect my diverse experiences as a learner, a teacher and a leader. Each of these roles is a part of who I am as a person and an educator and provides direction and purpose for my research. To understand my motivation and convictions, I need to share with you significant elements of my autobiographical journey. This personal account reflects deliberate choices and

serendipitous experiences which have influenced my thinking, my beliefs, my scholarly interests and now my interest in focusing on strengthening teacher leadership for social justice. I have organized this autobiography into four chronological phases, each of which emphasizes the prominence of the themes of social justice, leadership development and education: 1) early visions of leadership, professionalism, and inequity; 2) first efforts at tackling curriculum leadership; 3) research immersion, apprenticeship and application; and 4) the emergence of my research focus. In each section I will outline key events, questions and tensions that have contributed to my dissertation focus on developing teacher leaders for social justice.

Early visions of leadership, professionalism and inequity. As the youngest of four children in a family steeped in books, music, ideas and activism, I learned at a young age that you needed to speak up or be left out of the discussion. If you felt strongly about an issue you had a responsibility to act. Because my parents and grandparents were active volunteers, taking on responsibilities in the community was an unspoken expectation in our home. I began formal learning about leadership in my early teens as a youth leader at the local YMCA (Y). For the years I was involved in the leadership development program, I attended weekly training sessions facilitated by supervisors who were education students. These sessions focused on providing us with an introduction to leadership skills and practices. They provided time for us to reflect on our volunteer placements in the Y's recreation programs and to problem solve collectively. I remember the high expectations they set for us as leaders, and the significance they placed on our leadership role and our individual commitment. They challenged us to realize that our commitment as leaders needed to go beyond punctuality and reliability, into providing

quality programming and emotional stability for the youth in our care. This vision of leadership as a position of trust requiring personal sacrifice, responsibility and reliability has sustained me for almost 40 years and influenced my personal life, my professional career in education and my academic pursuits.

As a result of these early experiences, I was committed to entering education and studying to become a teacher, however I believed that preparation for teaching included learning beyond the university from life experiences, work and travel. When I was offered the opportunity to accompany a friend on his travels to South America and Africa, I jumped at the chance. For a year and a half we backpacked on a very low budget through Mexico, Central and South America and Kenya. These travels brought me face to face with real poverty and profound examples of the inequitable distribution of the world's resources. On all three continents I heard and saw many examples of development aid gone wrong. In Kenya, I visited volunteers who worked for international aid agencies and witnessed first-hand how farm equipment in fields sat idle due to disrepair. I saw yellow corn donated by well-intentioned northern countries left unclaimed by Kenyans accustomed to eating only white corn. I heard stories of countless projects abandoned midway through when funding ran out. One prime example of this was a fish processing plant built in the middle of the desert in Peru, with no accessible water source. It seemed to be easier to solicit funding for new initiatives than to sustain existing ones. I began to see inequity at every turn.

On my return to Canada I got involved with the Latin American community and met my future partner, a Chilean political refugee. Seeing the city of my childhood through his eyes provided vicarious experience with discrimination and inequity. As I

studied history and Canadian studies at the university, I learned to view these experiences through political and historical perspectives. I became very impatient with what I perceived as the slow pace of change and participated in a number of campaigns and protests aimed at raising awareness and creating change related to women's health, peace and political stability in Central America and nuclear disarmament.

During my undergraduate studies in education, I had the fortune to be placed at an elementary school with a large special education program and a strong focus on integration. In this school, I was exposed to mainstreaming and the importance of belonging and friendship for all students. As a novice teacher in this setting I received very good mentoring from a number of strong teachers who exemplified the best of our profession. These skilled and committed colleagues helped me to understand the importance of thorough and careful planning and also modeled dedication and professionalism. One of the visions shared with me at the time was that as special education teachers we aspired to do ourselves out of a job. We considered it our role to develop the expertise of our colleagues so that specialists would no longer be required to ensure students with exceptional learning needs would flourish in all classrooms. I recognized there was a need to develop the skill set of my colleagues to prepare them for this transition. I also realized there were only certain aspects of this role that I was prepared for as a relatively new teacher. This responsibility to contribute to the growth of others followed me through different teaching positions and into school administration.

After fifteen years of teaching in a variety of school settings, I moved into an administrative role, in which I was responsible for teachers' performance appraisals. I defined my responsibility as helping each staff member to develop their pedagogical

skills and improve their teaching practice as much as possible during the specified evaluation period. My expectation was that I would engage teachers in reflective conversations, suggest improvements, as well as recognize and develop their leadership potential. When I began to work with individual teachers, I realized that in my new position I was required to facilitate change in others, and that I wasn't quite sure how that could best be accomplished. I was really unclear about what specific actions on my part, if any, could contribute to changing a teacher's practice.

As a new vice-principal, I volunteered to be a member and later chairperson of the district Curriculum and Assessment Committee. In this role I participated in two significant book studies. The first was Linda Lambert's (1998) book *Building Leadership Capacity in Schools*. This book has been pivotal in framing my philosophy of leadership. What I had previously termed "developing others" was reframed as "capacity development". I was thrilled to read and discuss Lambert's book; it made perfect sense to me and matched my perception of leadership. Her checklists for assessing leadership potential and school leadership capacity matched my own ideas and served my purposes of supporting the growth of others. Lambert's ideas contributed to the leadership goal I set when I assumed a principal position. I planned to work myself out of a leadership position and leave when I felt the school was full of staff members capable of leading the school. I envisioned a staff that shared leadership responsibilities and had established processes for democratic decision-making. I happily embraced my role as capacity developer. A second book study we undertook on that same committee was Brookfield's *Becoming a Critically Reflective Teacher* (1995). Brookfield's dense writing and depth of analysis challenged me; I remember reading it with a dictionary to look up unknown

words. Yet it made me reflect on my role as a practitioner and school leader. At each book study meeting, I found I was excited to discuss my reading with colleagues, and challenged to expand upon my previous experiences with reflective practice. I was excited to be learning new skills for reflective practice in my leadership role.

As my years with the committee continued, I was involved in a long term professional learning initiative with Ruth Sutton (Clarke, Owens & Sutton, 2006) on feedback for learning. Building upon the work of Black and Wiliam (1998), Sutton worked through small group conversations to introduce teachers to the value and practice of articulating clear learning intentions, engaging students in reflection, and providing specific, immediate and constructive feedback to learners. As we learned more about the feedback process and its potential, we felt we should model the same behaviours in our work as administrators that were being expected of teachers. It seemed logical to us that teacher development required us to develop independent learners. Consequently, for many of us in the district, what began as an initiative to create independent student learners grew into a parallel goal of creating independent teacher learners and the challenge to support that process as administrators. Along with my inner city colleagues, and through the guidance of professional learning coach Caren Cameron (2011), I learned how to help teachers reflect critically upon their practice through learning conversations. Cameron modeled the importance of teachers articulating a focus prior to an observation taking place. As district administrators, we engaged in reflective practice together through what we called continuing conversations. This approach to professional development involved periodic reflective conversations with small groups of colleagues on a particular topic which were facilitated through the use of specific discussion

protocols. These conversations helped develop our capacity for reflective thinking and ultimately our ability to be independent leader learners. The collaborative and collective nature of these continuing conversations was typical of the way in which the inner city council of vice-principals and principals functioned. As a new administrator, I was lucky to land in a district where professional learning and collegiality were so highly valued.

One additional support we developed was a document called the Inner City District Principles of Learning (Winnipeg School Division, 2005). Working on the sub-committee to develop these principles was some of the best professional development I have experienced. There were only four of us on the sub-committee, two administrators and two consultants. We worked intensely over a year to identify five learning principles to be used to guide teaching and learning at all levels in inner city schools. We designed the tool using provocative questions to stimulate dialogue and encourage professional conversations about learning. The intellectual intensity of this sub-committee experience made me realize that the pedagogical knowledge I was applying to my teacher development work was dated. I responded to this tension by applying to the university to pursue my Master's Degree.

A further influence on my return to university was my experience as principal in an inner city elementary school. The demands of the job were very intense. The school population was highly mobile. We had a large special education program with medically and cognitively challenged students. We had a broad range of academic levels in every classroom. Over the six years I was principal of the school, I focused on creating an inclusive learning environment and found myself involved increasingly in community development work in addition to educational leadership. Many families struggled with

meeting their basic needs. Sub-standard housing was frequently a concern and there was a scarcity of support services in the neighbourhood. When we brought a group of parents together to brainstorm about what they wanted to focus on as a parent council, the message was clear. I was surprised to hear parents identify recreational opportunities and safety concerns as suggested goals for the parent council. Initially shocked that the suggestions appeared to have little to do with education, I came to realize that these were pressing needs that affected education significantly. I felt overwhelmed as I recognized the tremendous strain inner city families were under and began to recognize in this Winnipeg community the same social and economic inequities I had observed in Peru and Kenya. I understood that if children were not engaged in productive activities in the evenings and on weekends they were more likely to run into trouble. So we pursued these goals as a council. By the time I left there was a Boys and Girls Club, a mobile library, a summer enrichment program, the Families and Schools Together (FAST) Program to build strong families and communities, a new childcare facility in the works, numerous community safety initiatives and a community hub being drafted. I do not take credit for these initiatives, but I was involved in all of them in collaboration with a number of community organizations and volunteers. This aspect of my job was exciting and challenging, but it was in addition to my administrative responsibilities. A lot of my time went to what, in other circles, might be considered social work. I decided I needed the academic stimulation of learning at the university for my own mental health. Doing my Master's Degree part-time while a school principal ensured I would make time for reading, writing, discussion and reflection on my work without feeling responsible to immediately apply my learning at school. My desire to study topics not directly related to

my job as principal influenced my decision to study general curriculum rather than educational administration. I didn't realize until much later that that my commitment to leadership, teacher development and social justice would continue to weave its way into my studies.

First efforts at tackling curriculum leadership. Studying curriculum at the university was a wonderful experience for me. I loved the readings, the coursework, the new ideas I encountered. I looked forward to my Sunday study dates and found I often woke up early anticipating the opportunity to immerse myself in ideas. My very first course was on social criticism where I encountered the ideas of Michael Apple (2004) and concepts of social reproduction, cultural hegemony and critical pedagogy. Through reading Apple, I began to situate my experiences as an inner city leader within these constructs. For the first time I was reading about the challenges of creating change through education, in a class-based society where poverty and social reproduction seemed to be the inevitable outcomes. I came to view my frustrations at school as symptomatic of a larger system which reproduced inequity because it worked well for those with power and privilege. My concern for change to promote social justice acquired a critical lens through which I examined the influence and impact of various manifestations of power.

Through my action research course I first got a glimpse of a research approach that I considered vibrant, participatory and change oriented. Learning to evaluate educational programs in a subsequent course, I discovered that evaluations could take place in real conditions and that "as good as possible under the circumstances" was not an excuse but a reality, something which brought me great comfort. Everything I had to do in my role as principal was done at warp speed and full of interruptions. Prior to this

course I really could not envision doing any kind of research in my school. I knew I would be unable to control the variables in any research study, since the only constant I could count on in my daily life as a school administrator, was change itself. I also had the opportunity to study the characteristics of adult learners and encountered transformative learning and case study as approaches to learning. Both had tremendous applicability to my work as a facilitator of adult learning in my position as school principal.

The course which influenced me the most profoundly however was an independent study on leading for curriculum implementation and change. I found I had an absolutely insatiable appetite for reading about constructivist and transformative leadership. I found people who were focused on capacity development, accomplishing it through dialogue and reflective practice and working for change. I designed a small study carrying out learning conversations with my inner city colleagues and learned through their responses and my interaction with them a lot about leadership and learning (Smith, 2011). Through participating in, listening to, transcribing and analyzing these learning conversations, I realized a lot about myself as a learner. As I listened to conversations I heard myself voicing ideas from the earlier conversations and exploring the new ideas through dialogue. As the conversations progressed, I began to increasingly integrate content from the earlier conversations as I tested new ideas out on each conversational partner. I was going through a sense-making process while I was collecting new data. While the intent of the study was not to reflect on my own learning style, it nevertheless influenced the centrality of conversation and dialogue in my design of subsequent learning environments.

As I neared the end of my Master's program, I reflected on my experience as an adult learner. I realized that the learning environments which prompted me to change my thinking the most were those in which I had the opportunity to process my learning with others, through dialogue. I found that when professors structured the small group conversations with a protocol or prepared pieces of writing, I was more engaged as a learner and consequently understood the topic better and retained the information over a longer period of time. Another important influence on the quality of my learning experience was when professors took deliberate actions to facilitate the class becoming a community of learners. Simple techniques such as calling all students by name, remembering details about individual work contexts, sharing information on absent classmates, and allocating time for socializing, were very important to me as an adult learner. It was through the formal and informal dialogue that I came to know my colleagues as individuals and discover connections in our personal and professional lives. This adult learning experience clarified for me that when facilitating a group of adult learners and allocating time for both structured and unstructured conversations, I need to foster community building and provide opportunity for sense-making to occur.

Newly conscious of my learning preferences and what I saw as essential elements of effective adult learning communities, I was presented with the opportunity to be part of an action research project focused on creating a collaborative dialogue group of inner city leaders; I volunteered immediately. Six of us met monthly for four months to engage in dialogue around our leadership practice and our work in inner city schools (Lawson, 2008). This opportunity was invaluable for a number of reasons: I experienced an action research study as a participant, I observed a participant researcher in action, I became

totally committed to the value of dialogue, and I realized that research could be authentic and of tremendous value for the participants. I began to see research was not only possible and appealing, which was a new notion for me, but also that it could effect change.

A secondary consequence of participating in this dialogue group was that I realized that the stress I felt as an inner city administrator was echoed in each of my colleagues. It seemed that leading for change in high poverty school communities was an overwhelming responsibility. As we shared our experiences and our unresolved crises, I became concerned about the cumulative effects of working in high pressure environments over a lengthy period of time. Our school psychologist talked to me about vicarious trauma and compassion fatigue and I asked her to do a workshop with our school staff. One of my dialogue group members suggested we attend a train the trainer workshop (Mathieu, 2008) on the same topics at the annual teachers' conference in the fall. I attended the session alone as my colleague was unable to make it. Attending alone afforded me the opportunity to dialogue with professionals from the mental health field and to reflect on the impact of my work environment on me personally, rather than planning for how I could facilitate the learning of others. The combination of the reflection included in the session, the content of the seminar, and the experience of talking about my stressors with others unfamiliar with my environment, provided me with the opportunity to examine something I had been avoiding. On the self-administered checklists, I rated very high on the indicators for both compassion fatigue and vicarious trauma. The facilitator presented very clear data that the effects of both are cumulative, don't go away over time and can have long term impacts on health. The dialogue group

and the seminar together were a bit of a wake-up call. As a result of these experiences, I recognized the need for supportive communities such as the dialogue group in which individual leaders engaged in leading for change can share their experiences and access emotional release and support in an atmosphere of safety. I became committed to the notion of providing cognitive, emotional and practical support for educational leaders through such communities, to sustain them in their leadership for change. After doing further reading on vicarious trauma and compassion fatigue, I began to entertain the possibility that I needed a hiatus from inner city leadership.

Around the same time a friend kept dropping hints that the university was starting a new cohort on transformative teaching, leading and learning and suggested that I investigate further. When I read the description and the list of compulsory courses I was hooked. How fitting was it that there would be a course on curriculum leadership for social justice? As much as I tried to focus on completing my Masters, running the school, and co-parenting our two young adult children, the PhD program kept calling me and I finally decided I had to at least apply. So with the support of both my Masters' advisor and my proposed PhD advisor I prepared my application and submitted it for consideration. My planned area of focus was on working for, with and on behalf of school leaders, focusing on learner-centered leadership and on leadership for change.

Research immersion, apprenticeship and application. While completing coursework for my PhD, I was fortunate to work on three different projects as a research and evaluation assistant. All three projects contributed to my understanding of teacher leadership, leading change and social justice. The first project was a qualitative study of a summer institute for early years' teachers on the Reggio Emilia (Edwards, Gandini &

Forman, 1993) approach to teaching and learning. I was asked to attend some of the lectures, and participate in some of the group sessions, but mostly I was to interview and analyze data from participants in the institute. One of the lectures addressed the big ideas in Reggio which was the notion of emergent curriculum. Visiting professor Carol-Ann Wien (2008) presented the theory behind the Reggio approach to learning and I was really taken by the three prong focus on expansive values, expansive ideas and expansive practices. I began to make links between the notion of emergent curriculum and emergent leadership. Through the Reggio institute, I also encountered the notion of pedagogical documentation in which teachers capture student thinking in various formats and present it back to them in a series of panels. I was able to link this process to Rinaldi (2006) who described pedagogical documentation as the act of careful listening. I began to appreciate the leadership of teachers in the Reggio Emilia Schools as they demonstrated their intensely professional approach to in-depth pedagogical documentation. I appreciated the way education in the northern Italian town of Reggio Emilia was municipally funded with the intent of empowering their citizens from a young age to actively participate in democracy, so they would never again be subjugated by a foreign power, as had happened in World War II. I admired how the children were a valued part of the community and the community served as both classroom and curriculum. I began to wonder if, as an administrator, I could document teachers' practice the way Reggio teachers documented student learning. If I could do that, I wondered if it could be as powerful a tool for teachers' reflection and professional learning as the Reggio teachers' documentations were for children's learning.

In a subsequent research assistant role, I analyzed interviews with teacher candidates, cooperating teachers and faculty advisors reflecting on the value of their coursework, practicum and mentoring. As I followed the growth of the teacher candidates over two to three years of interviews, I once again noticed the value for the teacher candidates of participating in reflective dialogue. As I looked at their growth over time, I appreciated again the power of capturing or documenting people's thinking at different stages in a learning journey.

My third research responsibility was as an evaluation assistant with a division-based professional learning initiative focused on mentoring. As a principal in the same division, I had been a school leader mentor for an early service school leader for one year before beginning this position. As a mentor I had attended as many of the professional learning sessions as I could and had read the material provided. However, I never really understood the role of the mentor and the necessary skills to be developed until I worked in the project as an evaluation assistant. My responsibilities included attending a two day training session on learning-focused relationships delivered by Dr. Laura Lipton (Lipton & Wellman, 2003), during which I participated in the workshop activities, learned to mentor and took process notes. This was a powerful two days in which I was able to receive feedback on my mentoring skills and really focus on those specific skills. I also helped facilitate and analyze focus group interviews and sharing sessions, in which participants reflected on the impact of the mentoring program and how it could be strengthened. I videotaped and analyzed learning-focused conversations between mentorship pairs, looking for application of the skills introduced in the two day workshop and also helped to analyze data from surveys and action research projects. The intent of

learning-focused conversations and learning-focused relationships is to strengthen the ability of the mentee to reflect critically on their own practice. Through the opportunity to observe other mentoring conversations, I came to appreciate the richness of the dialogue and the value of the relationship and the practice for both mentor and mentee.

This position as evaluation assistant once again allowed me to experience research in an authentic environment, to be mentored by experienced researchers and to gain an appreciation for the importance of skill development and receiving feedback as a learner. Learning the theory, practicing the skills and observing numerous learning conversations deepened my commitment and understanding of this powerful process. Once again, experiencing the process as a learner deepened my commitment to specific practices designed to build capacity. One final element of this position was that I was able to listen to the group of early service leaders' talk about the impact of the time they spent together as a group reflecting on their practice; their experience echoed my own positive experience in the dialogue group. These experiences as a research and evaluation assistant accompanied by my coursework in the doctoral program, immersed me in research, developed specific skills and kept me involved in processes I found valuable including mentoring, reflection, feedback and dialogue. To me, these elements seemed essential tools for a change initiative focused on strengthening teachers' practice. As I pursued my doctoral program, this experiential base in these four areas significantly influenced my increasingly focused search for strategies to support teacher leadership development for social justice.

The emergence of my research focus. Being a full-time doctoral student has afforded me the luxury of immersing myself fully in doctoral coursework, teaching and

research. The courses allowed me to explore, integrate and consolidate theory and practice through scholarly writing. As I moved through each course I acquired tools that have contributed to my ever refining focus on leading for change in the area of social justice. In my critical theory course, I once again encountered critical pedagogy and the work of Apple (2004), but this time also McLaren (2009) and Giroux (2004). Their theories challenged my initial ideas about emergent leadership. I came to realize that leadership does not emerge solely from the individual and their actions, but rather reflects a complicated combination of background, opportunity and recognized potential. That led me to wonder what could be done to diversify the field of future educational leaders. How could teachers not traditionally viewed as leaders develop their leadership potential? I began to envision the kinds of interventions, opportunities, instruction and mentoring that would be needed to assist individual teachers from non-dominant cultures, for example, to move into leadership positions. The more I read on developing leadership capacity, the more I encountered the world of teacher leadership. It seemed to capture my interests in teacher development, leadership capacity and working for change in schools. The term teacher leader is more common in the United States though it is beginning to be heard more often in Canadian schools. Katzenmeyer and Moller (2009) advocate “awakening the sleeping giant of teacher leadership” to work as change agents in schools. I latched onto this notion of teacher leaders as change agents as it brought together my interest in leadership for change, capacity development and learner centered leadership.

When I discovered Crowther, Ferguson and Hann (2009), who linked teacher leadership to social justice, I was captured. Here in one model was a vision of the kind of teacher leaders who could be effective change agents in pursuit of social justice as well as

some of the strategies they might use in creating change at the school level. While I didn't see in their work a path for developing these teacher leaders, I did recognize that their model reflected my personal beliefs in teachers' leadership potential. Using teacher leaders to create change for social justice became my dissertation's area of focus, and from that point on I began to question how this form of teacher leadership, which focused on increasing social justice in schools, could best be developed, strengthened and supported. I reasoned that if teacher leaders are effective change agents, and if they can work for social justice, then what is their potential for influencing social justice in schools? And if teacher leaders do not emerge, but rather grow out of experiences, opportunities and skill development, then what could I do to support that leadership development? My focus narrowed to developing a leadership development program for aspiring teacher leaders who would have the skills, commitment and capacity to work for social justice in schools.

York-Barr and Duke's (2004) meta-analysis of twenty years of research on teacher leadership provided categories of studies, examples of findings, and identified gaps in the research and challenged my thinking. There was clearly a need for further research. I designed a small qualitative study which involved interviewing three teacher leaders about their views on leadership, their experiences as teacher leaders and the role the school administrator played in that process. While the interview and analysis was challenging and interesting, it left me with more questions than answers. Each of the three teacher leaders reported that they had been leaders since early childhood and often fulfilled leadership roles and responsibilities. This troubled my thoughts once again about emergent leadership. I had to recognize that these individuals had been in leadership roles

throughout their lives, and I questioned whether leadership was something people are born *with* or are born *into* in terms of their home environment and their social position in the community. An additional finding was that their leadership had three different foci, one individual focused on instructional leadership, one leaned towards managerial leadership and one saw herself as a change agent. Having worked with this last individual previously, I had witnessed the ways in which she provided leadership from within and was impressed to hear her motivations and strategies for influencing change from the position of teacher leader. I realized this category of teacher leader as change agent interested me the most as it had the most potential for linking the change process to issues of social justice. I saw the potential for teacher leaders to influence others within a school community using their position as a trusted teacher and colleague. I felt intuitively that this powerful insider approach had the potential to contribute to deliberate change in schools over a longer period of time. I narrowed my focus to developing teacher leaders as internal change agents for social justice.

Being offered the opportunity to develop a post-baccalaureate summer course in teacher leadership provided me with a wonderful chance to frame the important ideas around the topics of teacher leadership. Partnering with a colleague and friend, who would teach a mentoring course as the other half of a summer institute, was a wonderful opportunity to develop together a vision of effective teacher leaders who would have the skills to facilitate adult learning and mentor colleagues. We were committed to offering courses that would focus on developing both theoretical understanding and practical skills; consequently creating the course outlines involved a lengthy process of substantial reading, thinking, discussing, problem solving and anticipating the learning needs and

leadership experience of our future students. We wondered if anyone would actually sign up for the course and if teachers would be comfortable identifying themselves as leaders. On a personal level, I was curious to see if their experiences as teacher leaders would mirror those I had been reading about in the U.S. or if the Canadian and Manitoba context would be significantly different. We were thrilled to find there were thirty students registered and that their experience and starting points varied greatly. Students responded positively to the course, and I became convinced that the teacher leadership development model I was applying throughout the course had potential for developing teacher leaders. Reflecting on our experience with the institute, we decided that a number of significant factors had contributed to its success. Students appreciated opportunities to learn about leadership and adult learners and develop practical skills in facilitating adult learning. Developing an atmosphere of trust and risk-taking within the group provided multiple opportunities for students to discuss and reflect upon their leadership roles. Finally, opportunities to practice mentoring conversations and receive specific feedback from peers were greatly appreciated by participants in the institute. Students were excited to learn about teacher leadership and mentoring, they were interested in combining the two topics and they were engaged learners. We noticed over the course of the institute that students solidified their understanding of the important contributions they could make as teacher leaders and began to see multiple avenues for contributing to change in their school environments. Many of the students saw themselves as advocates for learners, both children and adults, whose needs were not being met, so issues of equity and social justice surfaced frequently in our conversations. It was an intense two weeks during which I learned a great deal about facilitating adult learning and the value of scheduling

time to discuss class readings using protocols to facilitate discussion. My focus had shifted from the existence, importance and potential impact of teacher leadership, to identifying the skills required to facilitate development of teacher leaders with the skills required to lead for social justice. As the course wrapped up, I wondered how students would use the leadership plans they had developed and how the course might influence their leadership work? I longed to stay in touch with them and see how their careers developed. I wanted to know in what ways the skills, topics and processes we had addressed in the institute supported teachers in their leadership roles when they returned to school in the fall. I began to appreciate the need for ongoing opportunities for dialogue to support teacher leaders as they implemented and developed their leadership initiatives. A second opportunity to teach the course proved to be a very different experience with a small group of nine students. The intensity of the interaction in this small class led me to believe that a small group of teachers meeting together over time to reflect upon and deepen their leadership could significantly impact each other's practice. I was beginning to imagine the potential of such a group and wondered what research methodologies might be appropriate to deepen my understanding of teacher leadership development.

During my studies, qualitative research allowed me to delve more deeply into narrative inquiry and issues of power for researchers. In an autobiographical ethnography I did on the emotional experiences of leadership, I discovered many research methods leaders were using to help them experience emotional release and thereby generate energy. The methods with the most impact were storytelling, dialogue groups, sharing personal journal writing with peers and sense-making. From the dialogue group study in which I participated, I also experienced the value of laughter in dealing with stress. It

seemed to be that these opportunities to share experiences were essential to providing emotional and practical support for leaders; yet also it seemed critical that these conversations were captured in a format which facilitated reflection and consideration within a group of peers at a later date. I recognized the connections, between this process of capturing dialogue, and my previous work with the Reggio study on pedagogical documentation. An idea began to form in my head, of using multiple forms of documentation to capture dialogue within a group of participants engaged in studying teacher leadership for social justice, with the goal of facilitating critical reflection on their learning. This notion seemed to satisfy my desire to sustain the communal aspect of the summer institute with the benefits of capturing dialogue for future reflection and analysis. In effect, I devised a plan to deepen the learning process by capturing moments in time and presenting them back to the group at a later date for further more in-depth and reflective consideration.

Another approach that seemed to offer potential for emotional support and reflection was communities of practice as envisioned by Lave and Wenger (1991). I was fascinated to read their studies on situated learning, the value of apprenticeship relationships and, also, how issues of power which surface in communities of practice need to be addressed. I was introduced to the concept of reification as the tangible recorded evidence of a group's thinking. Most importantly, I was involved personally in creating pedagogical documentation of one of our classes. This experience put me on a different side of documentation than the Reggio course had done: this time I was the creator of the documentation and I realized what intense learning it produced for the documenters. It was also a service offered to the other participants in the class because it

preserved our conversations and ideas. Bringing together a group of teachers with a shared focus to engage in dialogue and mentorship seemed to capture the important ideas of a community of practice; the practice of preserving those conversations through documentation seemed to offer potential for deepening the learning. Such a model, I felt, could provide the supportive community in which to take risks that I experienced during the summer institute, but also provide this support on an ongoing basis to mentor and sustain teacher leaders as they increased their involvement in leadership for social justice. I had no doubt that such a group could contribute to developing, supporting and sustaining teacher leaders active in social justice leadership.

At the end of my first year as a doctoral student I had the incredible good fortune to attend the Canadian Society for the Study of Education (CSSE) Conference in Montreal (2010). One of the sessions I attended was the Canadian Association for Studies in Educational Administration (CASEA) presentation by the Greenfield Award winners for outstanding doctoral dissertations in the field of educational administration. Marion Waithman (2009) presented a retrospective case study of her principalship in an inner city Vancouver school. The role she had played as a principal, heavily engaged in community development, seemed remarkably similar to my own experience as a principal. I found myself nodding my head as she described the lack of recreational opportunities, summer learning loss, the challenge of programming for highly mobile students, her difficulty recruiting strong teaching staff and sufficient funds to hire music, physical education and art specialists to contribute to a well-balanced educational program. The issues were similar and the responses were similar; they too moved towards a full summer program, after school programming and community partnerships.

What was new, and profoundly influenced the development of my dissertation, was the way in which Waithman framed all of her work around the principles of social justice leadership, including her decision-making as principal of the school, her lobbying on behalf of students and her dissertation. This was the first time I had encountered an actual framework for social justice leadership. More importantly it matched my own orientation so closely I realized I had found a name for what I did as a school leader. I also understood how my previously unnamed framework had contributed to my exhaustion. Not everyone apparently feels compelled to tackle the community development issues that surround a school! Those who do so are motivated because of their personal convictions to social justice. I was excited to hear how she used three categories of social justice leadership to lobby for service and funding on behalf of her school. I realized that although my leadership fit the description of social justice leadership, I had never articulated a social justice framework to my staff or used it in a productive manner to benefit the school. Waithman's presentation brought together my personal and academic worlds and helped me see that the theory I was studying could have practical utility in schools. I recognized that understanding social justice and being able to articulate its ideas clearly could contribute to achieving social justice in schools. I think it was my first understanding of the impact of good theory on practice. I realized that if I wanted to develop teacher leaders who could work for social justice in schools they needed to understand the fundamental ideas of social justice leadership. I reasoned that if that was true, then to be able to lead for change, they also needed to understand teacher leadership and transformative leadership. The content for my envisioned leadership development program began to expand from what I perceived to be essential

content and skills before teaching the summer institute, to include more extensive material on the purposes of social justice and transformative leadership. Teacher leaders, I reasoned, needed to understand the fundamental characteristics of leadership for change to be effective change agents.

Excited about the potential of social justice leadership, as I entered my much-anticipated course on curriculum leadership for social justice, I focused on how theory could inform practice, and how practice could reflect the principles of social justice. I read voraciously and was thrilled to discover many different scholars who explored similar ideas. I began to examine the impact of leadership on teacher activists and leaders and discovered that they experienced many of the same stressors that I had encountered in the inner city. For one assignment, I visualized a group of educators who would come together to engage in dialogue around social justice pedagogy, with the intent of supporting each other as critical friends and experiencing social justice pedagogy as adult learners. I decided there was a need for a collaborative group for social justice educators in the province. As I developed a vision, an action plan, and a guiding framework, I combined concepts from critical pedagogy, critical reflection, and critical theory with dialogic action (Freire, 1970, 2005). I imagined a group that would provide support, challenge and vision (Lipton & Wellman, 2003) to its participants. This assignment encouraged me to apply the theory I had been studying and envision possible action strategies for creating change.

A reading course that followed in my doctoral program on transformative teacher leadership allowed me to explore leadership theory, teacher leadership studies, and lessons from leadership development programs. This reading course helped me to

synthesize my ideas and develop the conceptual model for developing the agency of teacher leaders for social justice which has guided this study. The leadership development programs I studied suggested that successful leadership development programs began with individuals already committed to social justice and, then were provided an opportunity to develop their leadership capacity. I realized that if I wanted to support teacher leaders to implement change for social justice, the focus of the leadership development program would need to be on social justice leadership. I would need to work with ideologically committed participants to further develop their leadership skills. At this point I had a very clear idea of what I wanted to do for my research study and what the key components would be of my leadership development program, but I lacked the understanding of how I could undertake the research in a way consistent with the principles of social justice and leadership development.

The doctoral program has afforded me the time and space to reconsider ideas and concepts to which I was committed through multiple theoretical lenses of critical, socio-cultural and socio-political, social justice and leadership theories. By exploring theoretical foundations which support change, I have had the opportunity to explore issues that have surfaced in my previous leadership roles as well as identify potential pathways for creating change which furthers a social justice agenda. This study emerged from my personal and professional experiences as a learner, teacher and leader and reflects my commitment to both process and content. Processes to which I am committed include dialogue, reflection, action research, feedback, job-embedded learning, emotional support, learning conversations and mentoring. Content to which I am committed include teacher leadership, capacity development, equity and working for change through

transformative and social justice leadership. These commitments have emerged from my personal and professional experiences and have been deepened further through my academic studies. The three interwoven themes of leadership development, social justice and education which emerged from my personal autobiography became the three pillars of this research study (Figure 1). As I stated earlier, it is these life experiences, shared through this autobiography, that have brought me to this dissertation focus on developing teacher leaders for social justice and to specific aspects of the research design.



Figure 1. Three dominant themes in autobiography.

My intent in this autobiographical section has been to determine what my lived experience suggests would be an effective leadership development program to develop teacher leaders' skills and commitments to leading for social justice. My broad knowledge and experience base has led me to the previously articulated commitments. In the next section I integrate these personal commitments into the focus of my research on developing a leadership development program to strengthen teacher leaders' abilities to

lead for social justice. I first articulate the purpose of this study and the guiding research questions.

Purpose and Research Questions

The core purpose of this research study is to develop and assess the impact of a leadership development program designed to improve the practices of teacher leaders with commitments to social justice. As my autobiography revealed, through my Ph.D. coursework I encountered various theoretical frameworks that deepened my understanding and ability to reflect on my own leadership practice. Applying critical theory allowed me to identify systemic hurdles, faced by inner city students and their families, which interfered with their ability to make school success a priority. Studying strategies used by social justice leaders, I discovered critical reflection, appreciative inquiry and transformative learning, three critical processes teacher leaders could use to help their colleagues both explore issues of social justice and identify strategies to build equity in schools. Exploring various frameworks for leadership gave me the language to talk about and compare different approaches and pay attention to their purpose, characteristics and effectiveness in different contexts. My aim in this search was to identify leadership approaches that would be relevant to teacher leadership and the pursuit of social justice. Examining social justice leadership in education, or leadership which advances the level of equity in schools, allowed me to discover the ways in which leadership for social justice differed from leadership for other purposes, and what different dispositions it required from leaders. Learning about change theory allowed me to envision specific change models, identify their critical elements and make choices about what strategies might be effective in particular contexts. As a consequence of my

own studies and my experience teaching courses on teacher leadership development, I believed that teacher leaders would benefit from being introduced to many of these same theoretical frameworks and practices, specifically critical theory, reflective practice, transformative learning, appreciative inquiry and distributed, transformative and social justice leadership. I was interested in how awareness and application of these approaches could empower teacher leaders as change agents for social justice. Consequently, my first research question was:

- What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?

Just as my understanding and commitment to social justice was influenced by personal experience, my professional exposure and experience researching professional learning, have led me to value certain pedagogical approaches to adult learning. The leadership development model which I developed includes a number of these approaches to develop participants' ability to facilitate adult learning. To facilitate dialogue about issues of social justice, participants need to develop their abilities to engage others in critical thinking, critical reflection, appreciative inquiry and transformative learning. Similarly participants would engage in a series of action research cycles based on their individual leadership initiatives in their own schools. They would be supported in this job-embedded work by a mentor with whom they would engage in learning-focused conversations. I was interested in the ways these experiences would assist participants to strengthen and focus their leadership work. For this reason my second research question was:

- In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools?

Although teaching occurs in a social context and efforts are ongoing to make what is essentially a private practice public, it can still be isolating particularly for practitioners whose approaches challenge the mainstream. Stepping into a social justice leadership role can narrow the peer group teacher leaders can access for support and generate additional needs for emotional and practical support. Social justice leadership requires critical thinking and analysis which can be strengthened through critical dialogue with a group of equally committed peers. Communities of practice (Lave & Wenger, 1991) can provide members with support, challenge and vision and provide opportunities to achieve both relational and task outcomes (Lipton & Wellman, 2003, 2011a, 2011b). To be able to learn from the experience of teacher leaders participating in this leadership development cohort, my third question was:

- How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice?

This leadership development initiative aimed to develop change agents by strengthening participants' understanding of and commitment to social justice leadership and skills in facilitating critical reflection and transformative learning with adult learners. The critical elements of this leadership development program would be determined in response to the processes and outcomes of this leadership development initiative, which was built upon my reasoning, personal experience and research theory on effective

leadership development practices. Although my experience and literature review have led me to a tentative plan, this new course of action was tested and refined further through the research process. The intent was to identify a model for leadership development which fostered the skills and abilities of teacher leaders to be critical change agents for social justice. The fourth research question grew out of this intent:

- What leadership development model enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools?

The four research questions outlined here are closely tied to my intent to develop a leadership development initiative for teacher leaders. The resulting model incorporated and built upon the experiences of participants in this study. I crafted my research questions to focus my attention on how to best help participants acquire the knowledge, skills and dispositions teacher leaders require to be effective internal change agents for social justice. In the next section I review the organization of this first chapter and outline the rest of the dissertation.

Organization of the Dissertation

In this first chapter, I have introduced my research focus and provided an autobiographical background to the study. I also provided the purpose of the study and introduced the research questions. Chapter Two begins by identifying the key influences on the design of the study focusing on the areas of social justice, leadership development, and teachers as leaders. In this second chapter I provide an overview of the scholarly literature that has informed my research focus on a leadership development program as well as the conceptual model I developed to guide the study. Two more chapters complete this first section of the dissertation focused on the foundations of the study;

Chapter Three focuses on the research methodology and Chapter Four on research design and methods including the limitations and delimitations of the study.

The second two-chapter section describes the enactment of the study. Chapter Five describes the process of developing self-assessment and peer reflection tools for use during the leadership development sessions. Chapter Six describes the action research inquiry I conducted to study my facilitation of the leadership development sessions.

The third four-chapter section focuses on presenting the findings which answer the four research questions which underpin this study. Chapter Seven identifies the knowledge, skills and dispositions of teacher leaders for social justice. Chapter Eight articulates the contributions of seven different learning strategies incorporated into cohort sessions. Chapter Nine uncovers the contributions and impact of the co-constructed cohort community. Chapter Ten articulates the leadership development model which enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools.

The final two-chapter section describes the impact and outcomes of the study by focusing on interpretation and implications. In Chapter Eleven I analyze the significance of teacher leaders for social justice through an iris metaphor. Chapter Twelve articulates the conclusions, identifies the implications of the study for teacher leaders, facilitators of adult learning, theory, research and scholarship and recommends topics for further research.

Chapter Two: Literature Review

Chapter Two Overview

The three recurring themes of social justice, education and leadership development surfaced in my autobiography in Chapter One. In this chapter I begin by exploring these three themes through an analysis of the relevant and significant literature in each area. First, I look at literature related to the concept of social justice. Second, I narrow the theme of education to a more specific focus on teacher leadership. Third, I provide an overview of the scholarly literature on leadership development. Fourth, I identify what I perceive to be the gaps in the literature, specific to the focus of this study on fostering the development of teacher leaders for social justice. The chapter closes with a researcher-designed conceptual model in which I present key features that guide the leadership development program I use in this dissertation.

As indicated in my autobiography, my understanding of social justice developed initially through personal, travel, family and work experiences. The opportunity to explore social justice through academic study helped me to articulate my beliefs and understandings. This literature review establishes the context, need and intent for the study and describes the positionality and potential agency of teacher leaders. I explore the principles and processes of leadership development which influenced the conceptual model for teacher leadership development I designed to guide this study.

In the first section of the literature review, *Social Justice in Education*, I share definitions of social justice that resonate with my experience and the local context for social justice in the province of Manitoba. This is the context in which I work and study and the local discourse around social justice influenced potential participants, the design

of the research, and ultimately will determine its usefulness to the educational community. There is a demand for this kind of research in the province at present and a critical need for leaders who can help blaze paths for schools: “I am very interested in your research as ESD (Education for Sustainable Development) is one of our division goals” (Superintendent, Personal Communication, April 4, 2012). When I learned about the potential isolation of social justice educators, I was motivated to take this issue seriously and think about what could be done to support these lead teachers, so I share some of that illuminating research. I explore frameworks for social justice because it was transformative for me to encounter a framework for social justice leadership that combined various isolated ideas into one cohesive whole. I provide a description of social justice research, as another framework which informs the study and articulates different perspectives on social justice. After presenting a variety of influential frameworks of social justice, I focus more closely on one subtopic of the autobiographical theme of education, the topic of teachers as leaders.

The second section, *Teachers as Leaders*, begins with descriptions of teacher leaders in the literature and provides the definition of teacher leader that I will use for this dissertation. I explore definitions and examples of teacher agency to expand upon the intent of the study, which is to develop the agency of teacher leaders. I examine the types of power accessible to teacher leaders and why this access to power makes them plausible change agents. Finally, I articulate how aspects of the literature on teacher agency, power and leadership can support the identification and important responsibilities of a potential group of change agents I refer to as teacher leaders for social justice. The logical next step, once a group of potential change agents was identified, was to imagine what type of

leadership development program would support individuals interested in pursuing this path.

I begin the third section, Leadership Development, by defining critical leadership. I identify four different leadership frameworks which have potential to support critical leaders in developing personal philosophies for leadership. I examine the competencies and practices of transformative leaders who focus on creating change. This review helps identify knowledge and skills important to include as curriculum in a critical leadership development program for teacher leaders. I review theories, assumptions and attributes of leadership development which inform the intent and purpose established for the leadership development model. Next I explore the literature on effective professional development and principles which will guide the design of the leadership development sessions and the conceptual model. Finally, I review features identified in exemplary leadership development programs that can be incorporated into the leadership development model being developed and refined through this research. Following the presentation of relevant research on the three themes of social justice, teacher leadership and leadership development which have guided the conceptualization of the study, I identify what I perceive to be the limitations of the existing research.

The fourth section is entitled Gaps in the Research Literature. After reviewing the literature in the three identified areas of research consulted to design this study, gaps between what is known and what remains to be determined about developing teacher leaders for social justice became clear. I articulate these gaps in the knowledge base around teacher leadership for social justice. The final section of Chapter Two identifies the conceptual model I developed for this dissertation.

The fifth and final section of this chapter, *Conceptualizing a Teacher Leadership Development Model*, outlines the conceptual model I structured to develop teacher leaders for social justice. This conceptual model is based on a synthesis of the literature and will be used to inform the leadership development sessions with participants. This model will be evaluated and subsequently refined in response to the findings from the proposed research. The first level of the conceptual model introduces my rationale for a cohort of teacher leaders committed to social justice. Level two identifies the content knowledge and the learning processes participants would be exposed to as a result of their participation; the skills teacher leaders would acquire or develop further through the program; and the supports that would be put in place to sustain participants in their learning and leadership journey. The final level of the conceptual model is a description of the outcomes I anticipated for participants in the leadership development program focused on developing teacher leadership for social justice.

Social Justice in Education

Social justice themes which will be explored in this section of the literature review are presented in Figure 2. The illustrations in this and subsequent sections of the chapter are intended to clarify and delineate the contents of each theme. The six specific areas of focus include defining social justice, describing the local Manitoba context, identifying educators' needs for support, exploring social justice frameworks, examining the ways in which social justice is a contested space and identifying attributes of social justice research.



Figure 2. Social justice literature review themes.

Defining social justice. Most definitions of social justice involve ensuring access to equal rights, privileges and outcomes for all individuals. According to Bruner (2008), social justice includes “political, educational, legal, economic, social and other human rights of people. Social justice symbolizes the concept of fairness and advocates that no one be discriminated against on the grounds of religion, belief, gender, color, class, wealth or social status” (Bruner, 2008, p. 483). The definition that I have adopted for this dissertation, however, is drawn from the British Columbia provincial diversity document:

Social justice is a philosophy that extends beyond the protection of rights.

Social justice advocates for the full participation of all people, as well as for their basic legal, civil and human rights. The aim of social justice is to achieve a just and equitable society. It is pursued by individuals and groups through collaborative social action – so that all persons share in the prosperity of society. (British Columbia Ministry of Education, 2008, p. 13)

I have selected this definition because it suits a Canadian educational context and captures the range of ideas I consider central to leadership for social justice. As revealed

in my autobiography, my experience in Manitoba schools includes having worked in special education and inner city environments, so a definition of social justice, relevant to the Manitoba context, must accommodate notions of inclusion, diversity, equity and empowerment.

Manitoba's social justice context. Manitoba is at a critical time in its development as a province with the diversity in its population increasingly dramatically. With increasing immigration, in particular from countries affected by war and violence, Manitoba teachers are finding students in their classrooms speak a variety of languages and represent a plethora of cultural and educational backgrounds. While this diversity brings tremendous richness to classroom environments it also raises issues of equity and equality in educational programming. Educators are being challenged to innovate to meet the needs of learners whose experiences and resiliency vary tremendously from those they have been accustomed to teaching in the past.

Another changing demographic within the province of Manitoba is the proportion of students who are Aboriginal. This demographic shift is significant, because statistics for Manitoba indicate,

Close to 20% of the population of children and youth are Aboriginal, that Winnipeg has the second highest concentration of Aboriginal persons in an urban area in Canada, and that Aboriginal youth are more likely to live in low socioeconomic areas and have poorer educational outcomes than non-Aboriginal youths (Brownell et al., 2006; Canadian Education Statistics Council, 2003; Peters, 2005). (Kanu, 2011, p. 8)

Manitoba schools have consistently graduated lower percentages of Aboriginal students than non-Aboriginal students. There are a number of reasons why this has occurred including the legacy of residential schools, an internally colonized population, a lack of cultural knowledge among educators and a Eurocentric school curriculum and system (Battiste, 2005; Canadian Council on Learning, 2009; Council of Ministries of Education (CMEC), 2004; Fitznor, 2005; Kanu, 2011; Peden, 2011; Tejada, Espinoza, & Gutierrez, 2003). Since even entry level jobs require a high school diploma, in the near future we will have a larger percentage of Manitoba's population that will be under-educated and unemployed, unless Aboriginal graduation rates can be improved (Human Resources Development Canada, 2002). These statistics are behind Manitoba's Closing the Gap Strategy which aims to "reduce disparities in socio-economic outcomes between Aboriginal and non-Aboriginal Manitobans" (Aboriginal Education Directorate, 2008, p. 2).

A high percentage of Aboriginal families live in poverty which is known to have a negative impact on student learning and future employment (Levin, Gaskell & Pollock, 2007). To break the cycle of poverty it is essential that we begin to graduate more Aboriginal students, increase the number of students attending post-secondary education and entering the job market (CMEC, 2004; Manitoba Aboriginal Directorate, 2008). According to former Prime Minister and Aboriginal education activist Paul Martin (2011), the positive economic benefit of graduating the Aboriginal students who are currently in high school, would be staggering.

Ensuring academic success for Aboriginal students requires a culture of high expectations and outcomes, an appreciation of diversity and adopting an appreciative

rather than deficit orientation (McKee, 2011). According to Battiste (2005), Fitznor (2005) and Smith (1999), ensuring academic success for Aboriginal students also requires teachers to develop awareness of the Eurocentric nature of schooling: “sensitize ... educators in particular to the colonial and neo-colonial practices that continue to marginalize and racialize Aboriginal students” (Battiste, p. 5). Fitznor (2005) cautions educators that engaging in decolonizing Aboriginal education is difficult social justice work and can be draining on individuals. Manitoba teachers are at the forefront of the need for dialogue and action around these critical issues.

Manitoba teachers are mandated by the provincial government to teach about social justice in the Sustainable Development (Manitoba Education and Training, 2000) and Social Studies (Manitoba Education, Citizenship and Youth, 2007; Manitoba Education and Youth (MEY), 2003) curriculum documents. According to the provincial curriculum overview document, “Social Studies helps students acquire the skills, knowledge, and values necessary to become active democratic citizens and contributing members of their community, locally, nationally, and globally” (MEY, 2003, p. 3). Although Manitoba Education (ME) does not name social justice as one of its priorities, it does focus on inclusion, students who are traditionally less successful in school, Aboriginal and northern students (Manitoba Education, 2010b), and diversity (ME, 2010a); each of which correlates with visions of social justice.

In addition to the mandated provincial curricula, many schools have chosen to adopt a service component (UNESCO Associated Schools Project Network, ME, 2010). Some schools encourage students to identify needs in their communities and to create action projects they believe will address those concerns. Other schools have chosen to

undertake fundraising projects aimed at delivering financial assistance to deserving groups or organizations. A third type of project involves exchanging oral or written communication and/or visits between partnering schools. Such teacher and student-driven initiatives must operate from a strength-based perspective in which the beneficiaries are seen as capable partners, not recipients of charity. Educators must understand the complex issues related to international aid and be able to facilitate respectful and reciprocal relationships with recipients.

During the 2010-2011 school year, social justice was the focus of a number of provincial educational initiatives. In November 2010, the Manitoba Association of School Superintendents (MASS) sponsored a provincial conference in partnership with the Social Justice Coalition titled “Social Justice: Educating for ACTION” (2010). The four themes for this conference, taken from the United Nations Convention on the Rights of the Child, were human rights, identity and diversity, freedom and responsibility and eco justice (2010, p. 3). Many of the Special Area Groups of Educators (SAGE) of MTS had a social justice focus in their fall conference programs. The Council of School Leaders (COSL) of MTS hosted a February 2011 conference on leadership for social justice. MTS also awarded social justice research grants to teams of member educators in Manitoba schools. Manitoba Schools Improvement Project (MSIP) established teacher action research teams focused on classroom pedagogy for social justice. Participants in both programs shared their research experiences in a full day Just Teacher Forum coordinated by the Manitoba Education Research Network (MERN) and MSIP in June 2012. Finally, the provincial department of education launched its new equity policy and support page on its official webpage (MECY, 2010a).

More recently anti-homophobia initiatives have been visible in the province. In October, 2012 the MTS, the University of Winnipeg and EGALE Canadian Human Rights Trust, announced the Every Teacher in Every School Project in which they partner with researcher Dr. Catherine Taylor to initiate a national study of teachers' practices with regards to creating inclusive classrooms for Lesbian, Gay, Bisexual, Trans-Gendered, Two-Spirited, Queer and Questioning (LGBTQ) students (University of Winnipeg News, 2012). Since the on-line survey was launched, Manitoba has had the highest rate of participation in the study across Canada (P. Olson, personal communication, 2013). Almost exactly one year later, on October 10, 2013, after much public debate and discussion, the Manitoba Government proclaimed the Public Schools Amendment Act (Safe and Inclusive Schools), more commonly known as Bill 18. This act defines bullying, requires divisions to develop a respect for human diversity policy and supports students who wish to form groups to promote "awareness and understanding of, and respect for, people of all sexual orientations and gender identities; and b) use the name Gay-Straight Alliance or any other name that is ... inclusive and accepting of all pupils" (Manitoba Government, 2013). Although this legislation generated considerable public response initially, there has been very little opposition once it became law.

Social justice is of critical importance in Manitoba. There has been a steady increase in immigration and the Aboriginal population is growing quickly which presents challenges since the graduation rates and academic success of Aboriginal learners are significantly below those of non-Aboriginal Manitobans. There is a provincial mandate to teach about and through social justice and many schools are engaged in service learning which requires a critical understanding of charity and the challenges of international aid.

Provincial organizations, local researchers and the provincial government are promoting social justice through conferences, research and legislation. Social justice is clearly a timely and topical focus in the province of Manitoba. This focus highlights local achievements and generates expectations for change in Manitoba schools. These responsibilities exert pressure on Manitoba educators to be leaders of change, yet there is little support provided for teachers responsible for implementing social justice initiatives.

Needs of social justice educators. In addition to the curricular mandate mentioned above, teachers come to adopt social justice pedagogy through a variety of routes. Some, who have hopeful outlooks for the world or strong personal beliefs, recognize their obligation to expose students to the principles of social justice (Marshall & Anderson, 2009). Other teachers are drawn towards social justice content in response to the needs of the students they teach and the communities in which they live. Regardless of teachers' motivation, engaging in social justice pedagogy or adopting a social justice orientation, can generate a variety of responses. Some teachers feel unprepared to lead students in these forms of curriculum; while others fear they will be accused of inappropriately influencing students (Marshall & Anderson, 2009).

Advocating for social justice can leave teachers with a range of emotions and doubt about where to look for support. In their book *Activist Educators*, editors Marshall and Anderson (2009) include a number of qualitative studies on the experiences of activist educators. Their general observation is that "Social justice activism is fragmented: activists often feel isolated, unaware of activist colleagues" (p. 127). Marshall's (2009) own study "reveals educator activist identity as personal political contestation, wherein individuals' stances, voices, and interventions often require taking

personal risks, with little or no preparation or support from their professional or community culture” (p.156). In their multi-year study, Marshall and Anderson found “educators’ sense of risk and loss was lessened when supported by the establishment of networks” (p. 146).

Manitoba teachers working in the area of social justice share similar concerns, according to Lesley Weisshaar, Executive Director of the Manitoba School Improvement Program (MSIP) (Personal communication, November 29, 2011). Participants in MSIP’s annual retreats, which focus on social justice in the classroom, provide similar feedback. Teachers value the opportunity to work with like-minded colleagues, they feel validated and supported, they appreciate the chance to network and learn about new resources, and have their understandings of social justice pushed deeper. Teachers working for social justice, it appears, need a group of people to turn to who can provide many different kinds of support: emotional, pedagogical, practical and political. Digital communication can reduce isolation and maintain contact between face to face conversations, but personal and ongoing contact is powerful. It seems that a group of critical friends to help network, problem solve, engage in critical reflection and share instructional and organizational strategies, could support teachers who advocate for and engage in social justice work in schools. It is important that both individual teachers and networks of educators engaged in social justice work have frameworks which can guide their work so they are able to make thoughtful choices that are aligned with the principles of social justice.

Social justice frameworks. In the previous section, I identified a number of reasons why teachers who advocate for social justice need networks to support them in

their work. Individual educators and networks of teachers require frameworks for social justice to guide their work. Kincheloe and Steinberg (1995) state that equitable learning environments should be just, democratic, empathic and optimistic. In just environments everyone has equal access, equal outcomes, equal challenge and actions are sustainable. Democratic environments need to teach members how to participate in groups and in democratic processes, particularly those with the least power. Empathic learning environments have members who care for each other and nurture relationships. Optimistic organizations believe what they are doing makes a difference and maintain a hopeful stance towards students, communities and colleagues. While these may sound like fairly common practices in schools, many practitioners have unconscious beliefs in meritocracy and do not intuitively understand the difference between equity, which focuses on equal outcomes, and equality, which concerns equal opportunities.

Shields (2004) adopts Kincheloe and Steinberg's (1995) framework as one of her three recommendations for building a socially just school. Her other two suggestions for strengthening social justice practices in schools include examining practice and taking responsibility. To examine their own practice, teachers might look at the ethnicity or socio-economic status of their students and assess the impact of their pedagogy on differing populations. Educators might challenge each other to empower those being less successful in specific learning environments. Shields' final suggestion, to take responsibility, overlaps slightly with Kincheloe and Steinberg's final point about remaining optimistic. She challenges educators to reject deficit thinking, adopt student-centered pedagogies and stop blaming the system: "We need to act agentically, to lead deliberately, to facilitate transformative dialogue, and to achieve socially just learning

environments for all children” (Shields, 2004, p. 127). The concepts expressed by Kincheloe, Steinberg and Shields provide social justice principles upon which to build a personal guiding framework. Shields’ principles counter a common experience: often teachers are unaware of their own deficit thinking and its impact on learners, or do not notice the absence of marginalized community members’ voices in school dialogue. When people are aware of systemic discrimination a frequent response is to blame the system as unjust rather than work for change from within.

Skrla, McKenzie and Scheurich (2009) developed a framework for *equity oriented change agents* (EOCA) who work for change within educational systems. An EOCA displays a number of personal and behavioural attributes as a consequence of their equity attitude. An EOCA avoids demonizations, maintains an asset attitude and displays a coherent focus. EOCA’s initiate courageous conversations and demonstrate persistence and patience (pp. 70-78). Preskill and Brookfield (2009) organize their own framework around nine different skills that successful social justice leaders use in their work. These scholars recommend leaders learn about critical reflection, how to practice collective leadership and democracy, and how to support the growth of others. They advocate learning how to remain open to the contributions of others, how to question and how to analyze experience. Of fundamental importance, according to Preskill and Brookfield, is to learn to sustain hope in the face of struggle and to create community. These skills serve as possible processes to explore within a leadership development program aimed at developing teacher leaders for social justice.

If educators can learn to develop the skills identified by Preskill and Brookfield (2009), apply them through the approaches of an EOCA (Skrla, McKenzie & Scheurich,

2009) in a community which is critically reflective and takes responsibility for the success of all learners (Shields, 2004), then they can act in ways which reflect the four principles of social justice articulated by Kincheloe and Steinberg (1995). Frameworks for social justice help clarify the intent of leadership and provide guidance for decision-making and determining priorities.

Kumashiro (2009) cautions however against the reification of social justice:

”Learning to teach toward social justice involves constantly engaging with the things that make whatever we are doing uncomfortable and queer” (p. 54). “The point is not to fix the identity of ‘teacher’. That identity is always situated, in flux, ever-changing, always critical” (Pinar, in Kumashiro, 2009, p. 127). Ryan (2006) similarly advises leaders to always ask what perspectives and whose voices are being silenced, excluded or denied. While storytelling is valued to help build understanding and develop empathy (Ladson-Billings, 2009; McGregor, 2004), Kumashiro cautions against essentializing based on limited knowledge: “Lessons about the Other need to include learning to resist one's desire to know, to essentialize, to close off further learnings. The goal is not final knowledge (and satisfaction), but disruption, dissatisfaction, and the desire for more change” (Kumashiro, 2000, p. 34). Developing such a critical consciousness involves learning and unlearning about yourself, how you experience privilege and how systems perpetuate privilege. Guidelines for social justice research similarly suggest intent and provide guidance for sound decision-making around research design.

Social justice research. Social justice researchers aim to address inequities in society by influencing policy, politics and practice (Creswell, 2007; Griffiths, 1998; Robinson, 1994). According to social justice research methodologist Griffiths (1998),

researchers should express their social justice orientation at the outset, maintain that focus and intent throughout the study, identify their own conception of power in their research, and match it to the kind of empowerment they are seeking. Similarly, Creswell (2007) believes critical researchers should reveal their personal values and acknowledge how their beliefs can influence the study. Griffiths expects research for social justice to identify change strategies or ways to remove constraints to social justice, a process Creswell calls a transformative action agenda. According to Griffiths (1998), social justice research should focus on developing local knowledge and agency and be done ‘with’ and ‘for’ not ‘on’ or ‘to’ a population. Reflexivity is highly valued in social justice research; the researcher is urged to be self-reflexive and also to engage participants in reflective practice as well (Anderson, 1989; Griffiths, 1998; Lather, 1991; Morrow, 1994). Researchers are encouraged to have positive relationships with participants in their studies and to develop reciprocal relationships where both researcher and researched benefit from the experience (Fossey, Harvey, McDermott & Davidson, 2002; Lather, 1991). Social justice research is expected to be responsive to the context with a flexible and emergent design and researchers should be open to and experience a shift in their thinking as a result of their research (Creswell, 2007; Fossey et al., 2002). Robinson (1994) insists that critical research be small, immediate and doable, and generate practical solutions and assessable results. According to Griffiths, social justice research is intended to result in empowerment or provide a vision of strategies to reach that outcome.

This dissertation was designed to develop the ability of teacher leaders to provide leadership for social justice. In this section I have provided an overview of what I mean by social justice, described the Manitoba social justice context and identified the need to

support social justice teachers. I have presented social justice frameworks, learning processes and research principles which further inform the development of a model for teacher leadership development and the research design. In the next section I will introduce research on teacher leadership and outline why I feel teacher leaders are well-positioned to be change agents working to improve levels of social justice in Manitoba schools.

Teachers as Leaders

Five themes are explored in the teacher leadership literature (Figure 3). Through these themes I define and describe teacher leadership, synthesize what is known about teacher agency, teacher leaders and power. Finally, I apply these findings to describe the importance of a social justice orientation for a group of educators I call teacher leaders for social justice. This section of the literature review illuminates the research and scholarly works which support my decision to develop a leadership development program for teacher leaders as change agents.

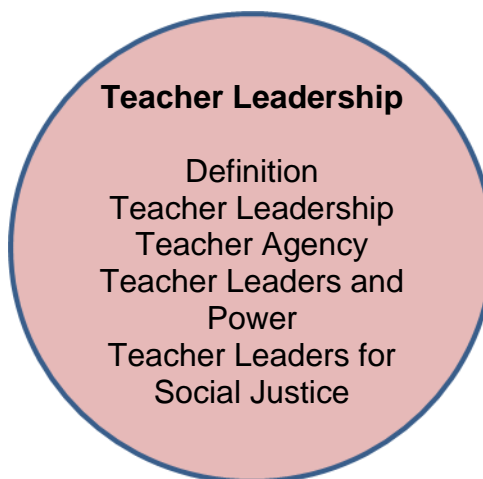


Figure 3. Teacher leadership literature review themes.

Defining teacher leaders. In the social justice section, I presented literature that defined and described various ways in which social justice connects to educational

practices and some of the issues that emerge as a result of this focus. In this section I will explore the phenomenon of teacher leadership and the potential for teacher leaders to contribute to social justice leadership in schools. Although the notion of teacher leadership has surfaced in educational circles for over twenty-five years, York-Barr and Duke (2004), in their meta-analysis of twenty years of scholarship on teacher leadership, found there was no common definition in the literature. For this dissertation I chose to create a definition which built upon two of the more frequently cited definitions.

Katzenmeyer and Moller (2001) describe teacher leaders as follows: “Teachers who are leaders within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others toward improved educational practice” (p. 5). The features I valued in this definition were the classroom and school focus, the leadership within a community of learners and the focus on improving practice in schools. The second definition voiced by Crowther et al. (2009) adopts a more global view: “Teacher leadership is essentially an ethical stance that is based on the views of both a better world and the power of teachers to share practice that contributes to school success and the quality of life and the community in the long term” (p. 28). The appeal of this definition was its clear stance in favour of social justice through the phrase “better world” and its belief in the potential of teachers to contribute “to the quality of life in the community.” The definition of teacher leader, which I have used for this dissertation, includes elements of both definitions as well as ideas which are prominent in the social justice frameworks reviewed earlier: *Teacher leaders, by voicing ethical concerns and facilitating dialogue within diverse learning communities, influence others towards improved practice and strengthen educational outcomes for all learners.* This definition

reflects the traditional views of teacher leadership represented by Katzenmeyer and Moller, situates the intent of teacher leadership firmly within social justice similar to the Crowther et al. definition, and adds the dialogic process featured prominently in the social justice frameworks identified earlier.

Teacher leaders fill both informal and formal leadership positions and influence their schools largely through the strong relationships they develop and their credibility as effective teachers (Crowther et al., 2009; Katzenmeyer & Moller, 2009; Lieberman & Miller, 2008; York-Barr & Duke, 2004). Some of the various roles played by teacher leaders include literacy coach, math support teacher, department head, chairperson for school priority committees, principal designate, and informal mentor and sounding board for new teachers and other colleagues. Teacher leaders contribute to the growth of leadership capacity (Lambert, 1998; 2003a, 2003b) in their school communities by providing mentoring, coaching, modeling and feedback, facilitation and professional development (York-Barr & Duke, 2004). The plethora of these roles for teacher leaders and the centrality of these positions within schools support my premise that teacher leaders are well positioned to be change agents in schools. Recent literature on teacher leadership helps describe the leadership roles they fulfill in schools, their impact on others and how best to develop their leadership skills.

Teacher leadership. As mentioned above, according to Katzenmeyer and Moller (2001; 2009), teacher leaders occupy both formal and informal roles in schools, are “leaders within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others toward improved educational practice” (2001, p. 5). These scholars believe teacher leaders are selected because they are

considered competent, credible and approachable by their peers. Teacher competency requires: good subject area knowledge, strong classroom management skills and strong rapport with students, families, peers and administration. Credibility is accorded to teachers who are effective in the same conditions as their peers, working with similar student populations and under the same constraints. Teachers who are approachable are those who support novice teachers and are consulted by their peers for their highly valued advice. According to scholars Katzenmeyer and Moller: “within every school there is a sleeping giant of teacher leadership, which can be a strong catalyst for making change” (2001, p. 2).

Multiple images of teacher leaders engaged in change making are reflected in York-Barr and Duke’s (2004) meta-analysis of twenty years’ worth of research on teacher leadership. In their review of over 100 empirical studies which operationalize teacher leadership, these scholars found that teacher leaders grow in their understanding of instructional, professional and organizational practice as they lead. York-Barr and Duke recommend applying theories of leadership, power and organizational learning to studies on teacher leadership. Overall they found that the studies lacked a clear definition of teacher leadership, were mostly small scale and qualitative in nature and lacked a theory of action. They recommend future researchers explicitly identify the means by which teacher leadership influences others towards improving teaching and learning, and assess the linkages between possible variables.

Crowther et al. (2009) satisfy some of York-Barr and Duke’s (2004) call for new research which articulates a theory of action as to how change is facilitated by teacher leaders. Building on the scholarly literature and five years of international empirical

research, these scholars developed a six element framework for socially just teacher leadership which reflects the ways in which teacher leaders influence change in schools during large scale reform initiatives. Two of the visionary elements in this framework state that teacher leaders “convey conviction about a better world”; and “nurture a culture of success”. Two pedagogical aspects of the framework, are that teacher leaders “facilitate communities of learning”; and “strive for pedagogical excellence”. This framework associates creating change for social justice, with teacher leaders who “confront barriers in the school’s culture and structures” and “translate ideas into sustainable systems of action” (Crowther et al., 2009, p. 3). Crowther et al.’s research analyzes the work of the Australian IDEAS Project Team, whose name is an acronym for the five step change process consisting of: initiating, discovering, envisioning, actioning and sustaining (IDEAS) (p. 152). Andrews and Lewis (2004) studied three case studies of schools implementing the IDEAS framework in Australia and found “teacher leaders emerge from the professional learning community of the school to lead and mobilize their colleagues, influencing and engaging people throughout the organization” (p. 130). The IDEAS framework captures the efforts of both formal and informal teacher leaders and how they work towards improving social justice in schools. What is missing from the IDEAS research is any clearly described process to develop these leaders at a local level and examine their potential as change agents outside the context of large scale school improvement projects.

Ways in which teacher leaders influence their colleagues have been investigated by a number of scholars. Muijs and Harris (2003) found teacher leadership effective because it relies on developing positive collegial norms, influences “the quality of

relationships and teaching within the school” (p. 445) and exemplifies distributed leadership in action. Other studies have examined the methods of influence of teacher leaders and attribute the success of Finland’s educational system to its use of strong lateral relationships (Hargreaves & Fink, 2008). Lateral relationships that exist between colleagues in similar positions within an organization provide both pressure and support over time. Firestone and Martinez (2007) echo the importance of relational power for teacher leadership and stress that teacher leaders need time, knowledge and expertise to be effective as leaders.

There is a focus within the scholarly literature on forms of teacher leadership and how teacher leaders are positioned to impact others. What has been inconclusive until recently is whether teacher leadership actually results in improvements in student learning. In their quantitative study, Leithwood and Mascall (2008) found that teacher leaders in designated leadership roles have a strong influence on the instructional practices of teachers. The recent long term quantitative study of Seashore Louis, Leithwood, Wahlstrom and Anderson (2010) correlates teacher leadership with increased academic gains in student learning. These researchers found that teacher leaders with strong leadership roles had more influence on teachers than teams or individuals and worked across curriculum and grade level boundaries. High performing schools correlated with high levels of distributed leadership. Seashore Louis and colleagues consequently recommend leadership training be provided to formal teacher leaders because they are well positioned to effect change. They conclude: “When teachers and principals share leadership, teachers’ working relationships are stronger and student achievement is higher” (p. 37).

Teacher leadership, as defined and shown through the sources cited, is effective in improving working conditions for teachers and learning conditions for students. Teacher leaders, whether chosen informally by their peers or placed in formal leadership positions, are able to exert influence through their relational power, their ability to influence collegial norms and their lateral positioning relative to other teachers. Three large and significant studies (Crowther et al., 2009; Seashore Louis et al., 2010; York-Barr & Duke, 2004) provide detailed analysis of the ways teacher leadership has been operationalized in schools. What is missing from this research base on teacher leadership is a focus on how teacher leaders can negotiate power issues in educational organizations, the potential contribution of leadership theories beyond distributed leadership, and the means by which teacher leaders influence their colleagues. These gaps are identified in a recent publication on teacher development which describes the need for further research in this area:

Because the face-to-face interactions are of such significance in influencing development, we suggest that future educational development projects seek to qualitatively determine the nature of the processes associated with individual and group development. At the heart of such research is determining through listening to participant voice the nature of the processes having an impact upon an individual's development. (Lewthwaite, 2011, p. 82)

Looking beyond roles and ways of creating change, a third aspect of the literature on teacher leadership is how to develop teacher leaders. Harris (2003) found that to be effective, teacher leaders need time, rich professional development and ongoing networks for collaboration. Clemens, Milsom and Chaswell (2009) found that for school

counsellors to be effective leaders they needed to learn the skills of advocacy and leadership. When teacher leaders were found to have had little impact in schools, there were often power issues complicating their leadership work (York-Barr & Duke, 2004). Consequently, teacher leaders need help to learn how to navigate through the interpersonal and political dynamics that arise in leadership (Stoelinga & Mangin, 2010). While these studies identify what teacher leaders need to provide effective leadership, they provide little guidance on how to develop the necessary leadership skills.

The potential of teacher leaders to influence practices in schools and the ways in which they influence their peers has been well established. To acquire the necessary leadership skills, teacher leaders would be strengthened by having time to: focus on the nature and purpose of leadership, learn advocacy, learn how to negotiate powerful political structures and access a community of peers which can provide them with both lateral support and pressure. To further the effectiveness of teacher leadership for social justice it is essential that the teacher leaders be provided with leadership development focusing on the above skills in an ongoing group of learners. What we still don't know are the ways teacher leaders influence their colleagues to willingly embrace change. Engaging in collaborative inquiry has potential to develop teachers' understanding of the factors that influence teacher agency, or the ability to influence change.

Teacher agency. Agency is the belief that one is capable of making a difference by acting in one's environment. Teacher leadership is frequently associated with agency in the literature. Muijs and Harris (2003), describe teacher leadership as a form of shared "empowerment and agency" (p. 439), which stresses collective action. Andrews and Lewis (2004) note the importance of the individual teacher as a change agent in their

Australian case studies. Leithwood and Mascall (2008) found two different kinds of beliefs influence the agency of teachers: capacity beliefs and context beliefs. Capacity beliefs refer to one's self-efficacy or the belief that you are capable of stimulating change. Context beliefs refer to the conditions in which you find yourself and whether they enable or permit you to create the envisioned change. The ability of teacher leaders to create change among their colleagues depends on teachers' willingness to change. So what influences teachers to make change in their practice?

Richardson (1998) has observed that teachers will make changes in their practice when a recommended strategy works, fits into their beliefs about teaching and learning, engages students and accommodates the necessary level of class control. Margolis (2008) found that instructional teacher leaders provide this type of evidence to their colleagues when they present new pedagogical approaches. Their insider's perspective increases the potential impact of teacher leaders.

Reichert (2010) completed her doctoral research on the phenomenology of change focusing on herself as the change agent. As a district administrator, she was responsible for supervising the district's cadre of teacher leaders. Despite having a responsible position, she was initially frustrated by her own lack of power. As well, she was surprised to realize how much her perception of reality influenced her own agency. She found in her research that people at all levels in an organization have choices about how to influence others and can make decisions about how to interact and relate with others. To analyze her data, Reichert created a four quadrant model on which she positioned individual participants according to whether they possessed low or high power and low or high influence within the organization. She found teacher leaders had low levels of

positional power within the district but high levels of influence (or agency), which she attributed to their motivation, interests, interactions and collegial respect.

Fullan (1993) implored University of Toronto's Faculty of Education to create teachers as change agents and model the same actions themselves as faculty members. He describes change agents as people who practice *interactive professionalism* (Fullan & Hargreaves, 1991). Interactive professionalism includes practicing reflection in action, on action and about action and adopting a risk-taking mentality. Interactive professionals trust processes as well as people, commit to working with colleagues and define a role for themselves that extends beyond the classroom. These individuals commit to continuous improvement and perpetual learning and monitor the relationship between their actions and students' development (cited in Fullan, 1993, pp. 6-7). Interactive professionalism suggests that a teacher leadership development program which encourages members to take risks and reflect on and discuss their actions in a community of learners would be likely to support the development of teachers as change agents.

Much can be learned about developing teacher agency from studying the experiences of pre-service programs which focus on developing social justice leaders. Lane, Lacefield-Parachini and Isken (2003) studied Center X at the University of California which works with its teacher candidates to develop "social change agents" (p. 58). Center X uses a critical pedagogy model to create change agents and bases their work on Giroux's (1986) notion of transformative urban educators. Center X describes these individuals as those who "view cultural and linguistic diversity as an asset to teaching and learning" (p. 58). These researchers found that teacher candidates from their program were able to influence cooperating teachers to alter their perspectives by

engaging them in conversations about social justice. The work of Center X supports the notion of using teachers as change agents for social justice through the medium of personal dialogue.

Developing agency for social justice promotion will require teacher leaders to become aware of what kinds of arguments convince people to change their practice (Marshall & Ward, 2004). Cambron-McCabe and McCarthy (2005) recommend that change agents need to learn advocacy skills, reflexivity and how to ask difficult questions. Katsarou, Picower and Stovall (2010) conducted three case studies of schools developing teacher candidates' skills as social justice educators. They found that successful schools: created a third space for collaborative dialogue about social justice issues, challenged the teacher candidates' deficit thinking about students and collaborated with students to develop units with social justice themes to develop sympathy and solidarity. Faculty members found that students needed communities of support which could provide "protection from hostile environments" (p. 151). They anticipated that novice teachers would require an induction program or community-based group to belong to after graduation to continue to develop their agency as social justice educators.

Teachers demonstrating agency have been proven to influence their peers to make changes in their practice. Agency means having both capacity and context beliefs and an interest in contributing to the empowerment of others. Teachers will change their practice as long as the changes are perceived as doable, effective and consistent with their own views on teaching and learning. While some teacher leaders have some positional power, many teacher leaders have low positional power but high influence and require environments in which they can feel safe to take risks, reflect on their practice, strategize

new responses and reflect on student learning. Agency for social justice requires adopting a strength-based approach to children and seeing cultural and linguistic diversity as assets. To be effective, and to improve their skills and efficacy, teacher change agents need supportive communities in which to grow as educators both personally and professionally. To strengthen the agency of teacher leaders, the proposed leadership development sessions will need to acknowledge and incorporate understandings about agency into the curriculum and also help participants understand the type of power they can access as teacher leaders.

Teacher leaders and power. There are three different types of power which may be accessed by teacher leaders: *personal power*, *positional power* and *relationship power*. Forms of personal power demonstrated by teacher leaders are *referent power* and *expert power* (French & Raven, 1959). Referent power means that their colleagues can identify with them. Expert power means that their professional teaching knowledge is respected. According to Hoerr (2005), expert power is one of the hardest and most valuable forms of power for principals to achieve, so this expert power is very useful. Teacher leaders are effective because they have referent and expert power as well as the support and respect of their colleagues. This puts them in position to fulfill the roles of boundary spanner, capacity builder and change agent within the school environment.

As a consequence of teacher leaders being respected by their peers, administrators often see them as strategic allies in terms of bringing about change in the school and as valuable sounding boards for school decisions. This position has been referred to variously as *boundary spanner* (Bass & Bass, 2010), *the meat in the sandwich* (Hulpia, Devos & Rosseel, 2009), *mediating* (Muijs & Harris, 2003) and *caught in the middle*

(York-Barr & Duke, 2004). Boundary spanning allows teacher leaders to listen, clarify and interpret messages between different groups in a school community. They can also provide an insider's perspective on how the leadership actions of the principal are received by their colleagues. They can provide their peers with some of the thinking behind an administrator's actions as a consequence of participating in leadership conversations. Politically, the position of boundary spanner is a tricky one which causes teacher leaders considerable tension (York-Barr & Duke, 2004). Another role fulfilled by teacher leaders that is slightly less precarious is that of capacity builder.

Building *leadership capacity* is one of the key actions of teacher leaders (Katzenmeyer & Moller, 2009; Lambert, 1998; 2003a). Leadership capacity refers to a person's ability to contribute in meaningful ways to shared leadership. Building leadership capacity entails modeling and supporting others to learn the necessary skills and strategies to increase their ability to make valuable contributions to that process. Building *organizational capacity* is associated with teacher leaders who lead through committee work, professional organizations or teacher unions. In the process they increase their own competency in organizational leadership skills and those of their colleagues. Building *pedagogical capacity* is another responsibility for teacher leaders whose area of leadership is instructional in nature. One pedagogical capacity building responsibility often associated with teacher leaders is that of *leading professional learning communities* (Katzenmeyer & Moller; Lambert; Lieberman & Miller, 2004), a job for which they are uniquely suited due to their pedagogical and interpersonal competencies. The intention of professional learning communities (PLCs) is to support growth, build capacity and bring about change in pedagogical practices (DuFour &

Eaker, 1998). This final purpose of a PLC links to the third role teacher leaders play in schools, that of a change agent.

Teacher leaders serve as change agents in schools, usually because they are passionate about some aspect of their practice and their passion is contagious. Inspired by personal convictions, experience and knowledge or skill, teacher leaders demonstrate enthusiasm and expertise in their chosen area of leadership. Muijs and Harris (2003) refer to this as *agency*, or the ability to see oneself as an agent of change. Harris (2003) comments on the challenge this agency brings to the profession: “putting the word ‘teacher’ in front of ‘leadership’ ... implies that teachers have the agency to lead change and to guide organizational development and improvement” (p. 322).

In the literature, as we have seen, teacher leaders are considered as boundary spanners, capacity builders and change agents. They possess both referent and expert power. All of these attributes connect to the role of teacher leaders as agents of change and are possible because of the meaningful relationships teacher leaders form with their individual colleagues, their administrators and various groups of teachers with whom they work. These three levels of relationships which influence teacher leaders are known in managerial literature as lateral, dyadic and team or group relationships.

Agency of teacher leaders is supported by the strong lateral and non-hierarchical relationships they have with their teaching colleagues. The referent and expert power bases considered earlier provide teacher leaders with the credibility to influence their peers (Elias, 2008). Teacher leaders influence their colleagues to adopt new pedagogical practices by making theory come alive in use, showing current examples of student work and addressing the gritty realities of implementation such as time management and

materials (Margolis, 2008, p. 300). This ability to influence practice in a very pragmatic manner is a unique attribute of teacher leadership which builds on their strong collegial relations and contributes to their effectiveness as inside advocates for change.

Despite having strong collegial relationships, teacher leaders face challenges as a consequence of the differing levels of interdependence between people. Levels of interdependence can vary greatly in different school environments and teacher leaders tend to be closely connected to a lot of people on staff. This high level of interdependence can put pressure on teacher leaders as they engage in leadership activities. They are conscious of a variety of needs and may be stretched to meet all of them within their time constraints (Yukl, 2010). Another type of lateral influence which can be problematic for teacher leaders is referred to as the *crab bucket phenomenon* (York-Barr & Duke, 2004) where colleagues discourage their peers from taking on additional leadership responsibilities in the way crabs pull each other back when one tries to escape from the bucket. The crab bucket phenomenon is an example of a *collegial norm* (Muijs & Harris, 2003). Some collegial norms perpetuate ineffective practices in a school. To be effective, teacher leaders need to be able challenge the status quo and engage their colleagues in conversations that unsettle these assumptions, a task for which they seem well positioned. Teacher leaders need opportunities to engage with teachers in this way. Facilitating these opportunities necessitates a teacher leader who is trusted fully by their administrator.

Relationships between administrators and individual teacher leaders are by definition dyadic in that they are two-people relationships. One theoretical exposition of this dynamic relationship is known as Leader-Member Exchange (LMX) (Graen & Uhl-

Bien, 1995). LMX describes the way pairs of people, usually a leader and his/her subordinate, determine their role relationships and how these roles change over time. The first stage of LMX is the in-group and the out-group phenomenon, with the in-group getting more privileges. In most cases teacher leaders would be considered in-group members; however that position can shift when there is a change of formal leadership in a school or conflict with the administrator. Research has shown those people who have strong LMX demonstrate more organizational behavior (Yukl, 2010). Organizational behaviour includes working hard for the organization, being trusted and afforded the independence to make decisions. Individuals with high LMX have strong relationships with their supervisors, so that even when they are enacting the role of follower, they can be highly influential.

Teacher leaders are well positioned to influence their principals, even though, technically, they are in the position of follower within the organization. From their trusted position as a teacher leader, it is possible to implement and question decisions, compensate for a leader's weaknesses and build on their strengths. Preskill (Preskill & Brookfield, 2009) identifies various followership roles which have relevance for teacher leader/principal relationships. Specific roles they identify include: keeping leaders committed to their vision and mandate, acting as a receptive learner, a curious questioner, and an advocate for democracy. Being an influential follower is a critical role for teacher leaders and one that can be enacted in both dyadic and group situations. In the different leadership roles that they play, it is critical for teacher leaders to have strong relationships with other group members of self-governing groups or teams.

Just as dyadic relationships are characterized by differing levels of LMX, a corresponding body of knowledge referred to as Team Member Exchange (TMX) addresses the relationships between members of groups or teams. Within a school setting, TMX would refer to the ways in which members of committees or other teams of teachers (some of which may also include parents and/or students) interact. Teacher leaders frequently fulfill leadership positions within these teams and their knowledge of social group dynamics and group process can increase the effectiveness of their leadership. Sawyer (2006) has found through discourse analysis that groups use two main problem-solving approaches: problem-finding conversations that are open-ended and exploratory and problem-solving conversations that are closed and goal-focused. To be skilled in guiding different types of conversations within groups, Scribner, Sawyer, Watson and Myers (2007) recommend that “formal leaders and teachers must develop capacities in the areas of facilitation, interaction, and communication” (p. 96).

Given the opportunity to develop these skills for leading groups, teacher leaders can use their strong lateral, dyadic and team member relationships with colleagues, administrators, and teams to work for and lead change in schools. These strong relationships also support teacher leaders to fulfill the roles identified earlier of change agent, capacity builder and boundary spanner. These roles build on the exemplary teaching skills which streamline teacher leaders’ access to referent and expert power and acceptance by their colleagues as leaders. These attributes position teacher leaders powerfully to contribute to positive change in schools and make them appropriate participants for the proposed leadership development program.

Teacher leaders for social justice. Teacher leaders have been shown to be effective internal change agents with the support and capability to influence their peers. It is therefore of critical importance that the beliefs and orientation of teacher leaders be considered carefully, so that the changes they foster move schools in a positive direction towards ever-increasing respect for and enactment of social justice. Teacher leaders with the potential to lead for social justice must have a personal understanding and commitment and be able to focus their leadership efforts on approaches which further advance social justice in schools. They need to provide leadership which helps others develop their own awareness and understanding of core principles of social justice as well as effective strategies to promote equity in schools. For teacher leaders with social justice convictions to lead for social justice, they require an understanding of the ways in which leadership theory can influence the approaches and stances leaders choose. This section of the literature review has identified key aspects of teacher leaders' positionality that indicate their powerful potential to create change. In the next section I will explore the praxis of leadership including leadership theory, leadership practices and factors which influence the development of critical leaders.

Leadership Development

This section of the literature review is intended to inform decision-making about the intent, design, and content of the leadership development program that is proposed, implemented and revised through this study. The scholarly works cited suggest learning and design processes likely to support teacher leaders in acquiring and reinforcing the knowledge, skills and dispositions to lead for social justice. Figure 4 outlines the five

themes explored in this leadership development section. Each theme contributes to the design of the leadership development model that is the focus of the research.



Figure 4. Five themes identified in the leadership development literature.

Critical leadership frameworks. As explored in the previous section, teacher leaders are well-positioned to facilitate change in schools. Effective leadership, however, requires more than being in the right place at the right time. Teacher leaders must understand critical leadership. For the purpose of this dissertation, critical leadership is conceptualized as a blend of distributed leadership, transformative leadership, social justice leadership and instructional leadership. Emergent leaders who are familiar with the characteristics, purpose, strengths and limitations of each approach would be able to make appropriate choices when in leadership roles.

Distributed leadership. Distributed leadership is described as shared leadership among the members of a school community (Leithwood & Mascal, 2008). Broadening participation in decision-making and developing more lateral power distribution has been found to lead to higher quality decisions and higher levels of organizational commitment and organizational behaviour (Yukl, 2010). By involving more people in decision-making processes a principal can build leadership capacity (Lambert, 1998; 2003a) among the

staff. Since more minds on a task generally make for more informed decisions, higher levels of participation should lead to greater effectiveness as a school community.

Teacher leadership is one particularly noteworthy aspect of distributed leadership. Teachers who are well situated to become leaders enjoy the respect of their peers, their students, the parent community and their administrator (Katzenmeyer & Moller, 2009). Teacher leaders, by voicing ethical concerns and facilitating dialogue within diverse learning communities, influence others towards improved practice and strengthen educational outcomes for all learners (Crowther et al., 2009; Katzenmeyer & Moller, 2009;). Teacher leaders can serve as boundary spanners with administration, change agents and organizational and pedagogical capacity builders (Bass, 1998; Harris, 2003; Hulpia et al., 2009; Katzenmeyer & Moller, 2009; Lambert, 1998, 2003a; Lieberman & Miller, 2004, 2008; Muijs & Harris, 2003; York-Barr & Duke, 2004).

Leadership capacity is a critical concept within distributed leadership for emergent leaders to understand. Lambert describes leadership capacity as “broad-based, skillful involvement in the work of leadership” (1998, p. 3). Teachers are often unfamiliar with the concept of leadership capacity. By framing committee chairing and other responsible roles as leadership, teachers begin to see themselves as teacher leaders and gain insight into how leadership can work within a distributed framework. Focusing on teacher leadership as one aspect of leadership capacity has the potential to empower participants in their current roles as well as support them in acquiring new understandings of leadership. By associating the role of teacher leader with social justice leadership, participants can develop further agency to contribute to socially just educational environments in their immediate context. It is critical teachers begin to position

themselves as leaders who can implement strategies immediately without waiting for a more formal leadership designation.

Transformative leadership. Transformative leaders focus on building momentum for positive change within the school. According to Burns (1978), transformative leaders work towards reducing inequities in society through engaging members of the school community in supporting and working towards change. Transformative leaders work towards enacting change locally: “Transformative leadership – with its emphasis on inequity, power and promise, and its reliance on dialogue and the explicit naming of difficult issues such as racism – holds considerable power for ensuring that education is an important agent for societal change” (Shields, 2009, p. 53). Transformative leadership is particularly well suited to addressing an equity agenda: “Courageous and transformative leadership permits implementation of an equity agenda that is inclusive of all groups in society” (Shields, 2009, p. 58). Transformative leadership and social justice leadership overlap considerably in that both maintain an equity agenda.

Social justice leadership. Social justice educational leadership focuses on reducing inequities in schools. Social justice principals side with those who are less privileged and work to facilitate their full participation and success at school. Social justice leadership requires leaders to confront injustice, engage diverse communities in dialogue and develop systems which have been shown to reduce inequities and lead to equal outcomes for students (Brown, 2004; Cooper, 2009; Shields, 2004; Theoharis, 2007, 2008). Different approaches may be required for different students to ensure equitable outcomes. Social justice leaders need to embrace both critique and possibility (Shields, 2009) and maintain focus on academic achievement for all students.

Instructional leadership. Instructional leadership consists of providing leadership to teachers which results in stronger academic outcomes for students. According to Robinson, Lloyd and Rowe (2008) and Timperley (2008) this classroom-focused leadership style requires good solid knowledge of pedagogy and research. Instructional leadership also requires the ability to coach or mentor individual teachers by engaging them in reflective conversations about their pedagogical practices. It requires leaders to have knowledge about how adults learn and what types of professional learning approaches result in changed practice. Instructional leaders spend time in classrooms observing and supporting teachers. They participate in professional development opportunities alongside teachers and learn along with them. Instructional leaders rely on their experience as master teachers to help others to strengthen their own pedagogy (Lieberman & Miller, 2004, 2008). Robinson et al. (2008) found that instructional leadership has the largest impact on student outcomes of any leadership approach.

The four types of leadership identified here each make distinct contributions to a critical leader's repertoire. Effective leaders will require knowledge and skills in all four areas. Teacher leaders will likely be unfamiliar with critical leadership theory and need time to discuss, process and explore these theories during leadership development sessions before they can use them to inform their leadership work. Examining the practices of school leaders which support a transformative agenda can also assist teacher leaders in developing personal leadership frameworks.

Critical leadership competencies. The curricular content for leadership development sessions focused on developing the agency of teacher leaders. Therefore the skills developed should reflect the competencies of practicing leaders. Kose (2009)

studied transformative school leaders to determine how those individuals facilitated professional development with their staff. He found that transformative leaders perform five inter-related leadership functions which he named transformative visionary, transformative cultural leader, transformative structural leader, transformative learning leader, and transformative political leader. These are useful categories for describing leaders' actions in pursuit of social justice. The intent of the leaders in Kose's study was to facilitate effective professional development, consequently these roles inform the facilitation and curricular content of the leadership development sessions.

By working together with other members of the school community, transformative visionary leaders (Kose, 2009) generate consensus on important issues regarding the direction and focus for the school and ensure that the agreed upon vision raises issues of equity and privilege (Cambron-McCabe & McCarthy, 2005; Kose, 2009; Theoharis, 2008). Visionary leaders also adopt an asset orientation towards students, staff and community members and work towards their empowerment (Normore & Bianco, 2006; Shields, 2010; Theoharis, 2008). This stance creates a positive school culture.

Transformative cultural leaders (Kose, 2009) strengthen the school culture, cultivate leadership capacity and create a dynamic atmosphere in the school which is based on trust (Byrne-Jimenez & Orr, 2007; Theoharis, 2007). They create space in which dialogue and reflection can occur and in which people can be challenged on their current understandings and pushed by others to rethink or reassess their understandings in light of new information (Griffiths, 2003; Pounder, Reitzug & Young, 2002; Scapp, 2006; Shields, 2004). Encouraging reflective practice requires skilled facilitators who have the ability to develop relationships, manage conflict and facilitate group processes

(Donaldson, 2006; Donaldson, Marnik, Mackenzie & Ackerman, 2009; Griffiths, 2003; Shields, 2009). Caring power, which combines understanding and ability to care with the official power and position from which to model caring for others (Sernak, 2006), is also demonstrated by creating structures to support students.

Transformative structural leaders (Kose, 2009) develop inclusive practices (Bell McKenzie et al., 2008; Pounder et al., 2002; Rayner, 2009); use research-based strategies to strengthen equity in their schools (Ross & Berger, 2009); and develop improved organizational structures to support innovation (Theoharis, 2007). Actions of transformative structural leaders organize the school to create the best possible support systems for all students to learn.

Transformative learning leaders (Kose, 2009) focus on providing instructional leadership, which requires expertise in teaching and learning for both students and adults (Cambron-McCabe & McCarthy, 2005). In addition, they focus on how best to scaffold support for individual learners who might require additional assistance (Pounder et al., 2002). Learning leaders attend professional development with their teachers (Darling-Hammond, Meyerson, LaPointe & Orr, 2010) and ask hard questions about instructional programs. In essence becoming a transformative learning leader requires learning to apply theory to practice or engage in praxis (Rayner, 2009). Teacher leaders will likely find praxis challenging as they seek to lead by their principles in complex environments.

Transformative political leaders (Kose, 2009) work to bring together and negotiate the power dynamics between all the different stakeholders in school communities and build support for change. These processes require building strong community relationships (Riley, 2009; Scapp, 2006) with families, social services and

community agencies. Schools should also, “Challenge unequal power relationships based on gender, social class, race, ethnicity, religion, disability, sexual orientation, language, and other systems of oppression” (Normore & Bianco, 2006, p. 6). Learning to negotiate these political realities can be very challenging for novice leaders. The intent of exploring issues through this leadership development program is to support emergent leaders in recognizing power and politics when they surface in their work and to share some potentially useful strategies.

Experienced leaders who adopt a critical stance would be challenged to enact all of the transformative leadership roles identified by Kose. His framework nonetheless is helpful in guiding the curriculum of the leadership development model. The five types of transformative leaders describe the diversity and complexity of skills required by critical leaders. Consequently each of the five types of transformative leaders identified by Kose describes a group of skills suitable for inclusion in the leadership development model. Developing such skills can be challenging. Leadership development programs require competency-based content and clearly stated critical intentions. In the next section I explore literature that is helpful in conceptualizing the intent for the proposed critical leadership development program.

Intent of critical leadership development. Designing a leadership development program requires a good understanding of what the program is designed to accomplish. Literature reviewed in this section identifies relevant theoretical constructs, assumptions and considerations which have guided the process of identifying the intent of the leadership development program to be based on the model.

Scholars have suggested a number of theories which they have found helpful when assisting novice leaders to become critical leaders. Four theories which are identified as informing other social justice leadership development programs are adult learning theory, transformative learning theory, critical social theory and critical pedagogy (Brown, 2004; Shields, 2004). These theories situate personal experience, critical reflection, and collaborative inquiry as central concepts in leader development. Lambert et al. (2002), identify a theory of action for constructivist learning which includes purposing, doing, constructing, reframing and transforming. These ideas mean the leadership development program should provide opportunities for participants to reflect upon, question, and challenge current ways of thinking and leading; to clarify, change, and/or strengthen their values, beliefs and patterns of thinking; and to work explicitly at aligning leadership behavior and school practice with these strengthened ways of thinking.

Leadership development programs should be designed according to assumptions about how people learn to be leaders. The first assumption is that a program is only one small element which will contribute to the development of the future leaders who participate. Leadership competencies develop over time and will be an ongoing process throughout the careers of each participant (Anderson & Saavedra, 1995; Byrne-Jimenez & Orr, 2007). Preparing to be a social justice leader should be a personal growth experience (Brown, 2004; Byrne-Jimenez & Orr, 2007; Curry, 2000; Riley, 2009; Theoharis, 2007) and involve developing a leader persona or identity (Curry, 2000). To be prepared to provide critical leadership, novice leaders need to develop emotional resilience (Riley, 2009) and come to understand the moral imperative of educational

leadership (McClellan, 2010). Emergent social justice leaders need to increase their levels of awareness, acknowledgement and action (Brown, 2004). This process can help individuals develop a social justice praxis in which they are able to blend theory and practice (McClellan, 2010). These recommendations suggest that leadership development programs should be experiential, personal, and integrate theory and practice into praxis.

Leadership development programs should develop networks to provide participants with emotional support and advice in the future. According to Cambron-McCabe and McCarthy (2005) leadership development programs for social justice should help participants develop the ability to critique existing systems which reproduce inequities, be reflexive in their own practice and advocate for policies which support social justice. This style of leadership may require “a new language capable of asking new questions, and generating more critical practices ... such a language would have to reformulate traditional notions of authority, ethics, power, culture, and pedagogy” (Giroux, cited in Cambron-McCabe & McCarthy, p. 213). Recent research suggests that leadership development programs should provide sufficient time for dialogue in which this new language and new perspectives can be developed.

Bell McKenzie et al. (2008) suggest that leadership development should aim to develop participants’ critical consciousness. Programs should plan to support participants to learn effective teaching and learning strategies for diverse populations since leaders should be expected to create proactive systems of support and inclusive structures to support all learners. According to many scholars, a goal of leadership development programs should be to study successful leadership models and engage in pro-active

thinking about leadership priorities and principles (Byrne-Jimenez & Orr, 2007; Campbell-Stevens, 2009; Theoharis, 2007).

Social justice should be experienced as a consistent thread throughout leadership development programs rather than as an add on (Cambron-McCabe & McCarthy, 2005; Campbell-Stevens, 2009; Theoharis, 2008). Facilitators should model and follow socially just practices in administering programs. This means that personal needs and power relationships in groups need to be addressed right from the beginning and revisited throughout programs (Hafner, 2010). Adults learn through reflection on experience, dialogue with like-minded peers and regular exposure to ideas which challenge their assumptions and expand their analysis (Mezirow & Associates, 2000). This means that leadership development programs need to provide opportunities for collaboration. Leaders also learn to tackle problems in new ways by being exposed to the frameworks others use and engage in creative thinking using different approaches and experiences (Begley, 1995). As a consequence, problem-solving opportunities should be provided for participants to support them in developing a diverse repertoire of leadership responses and processes for thinking through issues which they can take with them when they leave the program (Stoelinga & Mangin, 2010). Learning from other participants and the experiences of other leaders should therefore be key intentions for a social justice leadership development program.

Based on the literature reviewed here, it appears that there are a number of features which should be reflected in the intentions of the leadership development model. Theories of adult and transformative learning, critical social theory and critical pedagogy should be reflected in the design of program intentions. The leadership development

program should be understood as one aspect of many experiences that will contribute to participants developing leadership. The program should help participants develop a network of support through dialogue and develop their critical consciousness. This program should combine a strength-based approach with an awareness of how to challenge the status quo and advocate for equality. Finally, the program should reflect principles of social justice in all aspects by being interactive and collaborative. Leadership development programs with critical intentions should utilize learning and design processes which reflect these same principles.

Design of critical leadership development. In the previous section I described factors to take into consideration when determining appropriate intentions for a leadership development program. In this section I turn my attention to the learning and design processes best incorporated into leadership development programs to develop the necessary leadership skills identified as competencies. I examine selected studies, in the large and ever expanding field of professional development for educators which have relevance to this dissertation study.

Based on her meta-analysis of the professional development literature, Timperley (2008) recommends nine approaches to professional development. According to her findings, professional learning should focus on valued student outcomes and worthwhile content, integrate both knowledge and skills, and include assessment for professional inquiry. Since the focus of the professional learning in the leadership program is on learning leadership skills, I suggest substituting the recommendation to focus on valued student outcomes to read “focus on valued leadership outcomes”. Timperley found facilitators of professional learning should provide teacher learners with multiple

opportunities to learn and apply information, process new learning with others, and incorporate knowledgeable expertise. This means participants in leadership development sessions should have frequent opportunities to reflect on their new leadership knowledge and process experience with others as they integrate the new ideas into their practice. Timperley found that responsive facilitation and active leadership can support learning processes and help maintain momentum (p. 5). As a designer of professional development, I need to be mindful of these indicators of quality professional development when designing the leadership development sessions for teacher leaders.

The current scholarship on professional learning for leadership development is understandably more specialized and specific. Andrews and Lewis (2004) recommend action learning, capacity building, appreciative inquiry, use of the IDEAS framework mentioned earlier, and actual opportunities to lead. Yost, Vogel and Liang (2009) did a comparative case study of retired teachers who mentor novice teachers by providing on-site support. Their job-embedded coaching, mentoring and modeling had a strong impact on teacher efficacy and student learning. For these teacher leaders, peer support was integral to their success, and the mentoring meetings led by group members were described by many of the participants as the best professional development they had ever attended. This outcome suggests that the opportunity to practice and refine leadership skills and receive feedback from within the group's membership should be considered essential. The training of the mentors was critical to their success and the teacher leader mentors felt they themselves would benefit from being coached in their practice. Hanson (2010) studied teacher mentors through a phenomenological approach and found there were two main impacts on the mentors themselves: they developed a broader perspective

and also a deepened understanding of professional development, both of which increased their leadership interests and commitment. As teacher leaders in this study will likely be engaged in leading professional development, it is imperative that they also experience quality professional learning opportunities that help them develop the requisite skills and that they have opportunities to refine their practice by facilitating the group's learning sessions.

Richardson (1998) recommends evaluating the professional development teachers receive to determine its level of success: "A measure of success is the degree to which teachers take responsibility for their actions, assume ownership of their practices and are able to articulate these actions and their justifications to another person" (p. 6). These criteria indicate that the impact of the professional learning innovation developed for this research can be assessed according to how well participants accept responsibility, assume ownership and articulate their actions to their peers.

Design process is really important when preparing leaders to facilitate professional learning. Carefully designed group work will result in participants acquiring both task and relational outcomes (Lipton & Wellman, 2011b). Through the use of carefully chosen strategies, professional development leaders can help group members develop the leadership skills and dispositions they require to be productive and effective group members. By sharing their planning approach, professional learning facilitators can make their design process explicit so participants can learn how to facilitate groups themselves that develop members' relational and task proficiency. Groups with high task and relational skills can handle difficult topics and be resilient under challenging circumstances. These recommendations suggest that leadership development sessions

should develop participants' skills in group work and deepen their understanding of the nature of group work to enable them to facilitate groups more effectively.

Based on the literature reviewed so far, the professional leadership development model that would be appropriate for developing teacher leaders for social justice would embody a number of key attributes. It would be group oriented and continue over time. It would be designed to provide emotional, technical and physical support to teacher leaders and help participants develop facilitation skills. The facilitator would need to be explicit about how to plan effective group work which can develop participants' group skills and ability to handle difficult content. The program facilitator would need to engage teacher leaders in questioning their personal assumptions and their own social identity. Learning to become a change agent for social justice is a personally demanding commitment so the time and space needs to protect participants from competing demands. Research indicates that the leadership development model being refined through this research can be informed by critical leadership theory, leadership competencies and responsive learning and design processes. The final focus of this review of the leadership development literature is to learn from the practices of exemplary social justice leadership development programs.

Quality criteria for critical leadership development programs. Four sets of criteria are frequently reflected in quality leadership development programs: program attributes, recruitment, duration and curriculum. Darling-Hammond et al. (2010), identify eight attributes of quality programs to develop school leaders who are skilled in instructional and transformational leadership. Recommended approaches include using research-based content, ensuring curricular coherence and facilitating field-based

internships. Quality leadership development programs incorporate problem-based learning strategies and make use of cohort structures. Exemplary programs also collaborate with universities and provide both mentoring and coaching. Each of these elements is therefore recommended to be part of the leadership development program proposed in this research.

Effective leadership development programs recruit diverse groups of participants from the ranks of skilled teachers who are committed to their division, and who have leadership experience. Recruitment in leading programs includes divisional teacher leaders and considers racial, cultural and gender diversity (Bell McKenzie et al., 2008). Programs deliberately include teachers with a record of coaching others in academic subjects, those who work in high needs settings and demonstrate commitment to urban learning environments (Darling-Hammond et al., 2010). Selected individuals are then brought together in a cohort to support the development of caring relationships and mutual support (Norris, Barnett, Basom & Yerkes, 2002; Darling-Hammond et al., 2010; Hambright & Franco, 2008). Bell McKenzie et al. (2008) identify criteria for a leadership development program suited to developing social justice leaders, in which they recommend that individuals be selected who already have leadership roles and social justice convictions. Most school leader development programs last between one and two years and maintain a consistent cohort throughout. Bell McKenzie et al. (2008) suggest participants be supported through a one to three year period of induction or praxis. This research informs the recruitment strategies and duration of the leadership development model being developed through this research.

Curriculum in exemplary leadership development programs is more likely to have focused on active learning which allowed participants to connect course work and placements. In-class activities include small group work, case studies, problem-based learning and opportunities to reflect and provide feedback to peers (Darling-Hammond et al., 2010, p. 55). The learning activities in which participants engage involve both personal and professional learning (Bell McKenzie et al., 2008; Brown, 2004; Byrne-Jimenez & Orr, 2007; Curry, 2000; Theoharis, 2008). Effective programs involve participants in action oriented learning in which they apply their insights to real problems in schools and have opportunity to develop responses together (Anderson & Saavedra, 1995; Brown, 2004; Cambron-McCabe, 2010; Darling-Hammond et al., 2010; Doh, 2003; Hill & Ragland, 1995; Lambert et al., 2002; Larson, 2008; Phillips & Hollingsworth, 2005; Pounder et al., 2002; Yukl, 2010). Effective programs involve students in field work where they are observing leaders in action and applying their new skills (Brown, 2004; Cambron-McCabe & McCarthy, 2005; Darling-Hammond et al., 2010; Lambert et al., 2002; Norris et al., 2002; Pounder et al., 2002). Aspiring leaders need to learn how to use data effectively and in particular how to interrogate data (Cambron-McCabe & McCarthy, 2005; Hill & Ragland, 1995; Parrett & Budge, 2009; Rossi, 2007; Shields, 2009; Skrla, Scheurich, Garcia & Nolly, 2010). They need to learn which questions to ask and how to find their answers (Lambert et al., 2002; Parrett & Budge, 2009). They need to learn as well how to create structures within schools which help students who are marginalized to gain self-esteem and recognition within the school as well as opportunities to accelerate their learning (Bell McKenzie et al., 2010; Shields, 2004). Effective leadership programs focus on developing cultural competency for the

contexts in which people work, in addition to critical perspectives on power (Brundrett & Anderson de Cuevas, 2008; Byrne-Jimenez & Orr, 2007; Campbell-Stephens, 2009; Dancy II & Horsford, 2010; Riley, 2009; Stovall & Duncan-Andrade, 2006). This extensive list of recommended curricular content for developing social justice leaders suggests that this initial foray into skill development should include realistic scenarios, the use of data, cultural competency and student-centered equity-oriented strategies.

Existing social justice leadership development programs are a valuable source of suggested strategies, content and practices which inform the proposed leadership development program. The individual and collective needs and expertise of research participants will influence the design approaches and curriculum considered most important for the proposed cohort. Their needs as a group will also evolve over time.

In this section of the literature review on leadership development, I have provided essential frameworks of critical leadership knowledge that support leaders in pursuit of social justice. These frameworks are helpful in describing the context for teacher leadership and identifying the essential understandings leaders require. I have examined the competencies demonstrated by transformative leaders and program intentions that would help frame a leadership development program in which participants learn these critical leadership skills. I identified the learning and design processes with potential to develop critical leaders and the practices followed by exemplary social justice leadership development programs for pre-service teachers and administrative entry programs. The challenge is to incorporate recommendations from this body of scholarly works and research on critical leadership into the design of the leadership development program for teacher leaders to be envisioned, enacted and revised through this study.

Summary of Literature Review

This literature review presented a variety of scholarly works in the areas of social justice, teacher leadership and leadership development. I have provided definitions, theories and findings from related research and scholarly writing which informed the design of this dissertation study. Figure 5 combines the three strands in the literature review and situates this research study at the intersection of these three concepts. In the social justice section, I described the dynamic and demanding social justice context for Manitoba teachers including the inequities to be addressed and the need to support isolated teachers engaged in social justice work. I also reviewed literature which will guide and support my intention to reflect the principles of social justice in my research design. In the teacher leadership section, I justified my selection of teacher leaders as potential change agents and participants in my leadership development program. As a result of their personal, positional and relational power, teacher leaders are well placed to create change in educational contexts. If these school-based leaders possess personal ideological commitments to social justice, then the impact of their agency will be increased acknowledgement and adherence in the school to the principles of social justice. Finally, in the leadership development section I identified specific frameworks, competencies, intentions and design principles to be integrated into the leadership development program designed to develop teacher leaders' agency in schools. In the section which follows I identify what I perceive to be the gaps in the research literature which indicate the need for research with this particular focus.

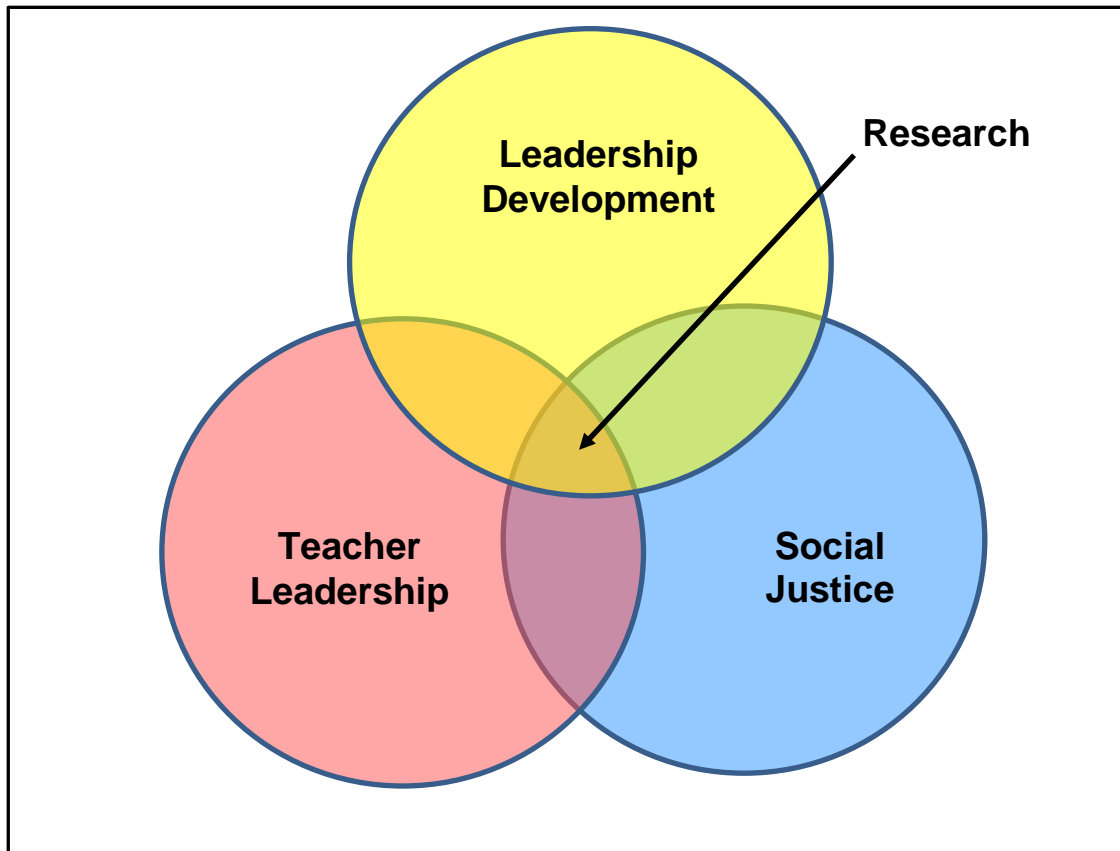


Figure 5. Venn diagram showing the intersection of literature review themes and location of this research at their intersection.

Gaps in the Research Literature

Although the research literature I present on social justice, teachers as leaders and leadership development suggests there is a significant body of literature on each of these topics, there are clearly disparities in the scholarly record. There is a clearly identified need for supports for social justice educators (Marshall & Anderson, 2009), and rich theoretical writing about what such a support system could look like (Kincheloe & Steinberg, 1995; Preskill & Brookfield, 2009). However, little research exists which identifies and studies existing support groups for social justice educators, the structure of such groups or their effectiveness. A second area in which there is insufficient research is in the area of means to help teachers to develop a critical consciousness (Bell McKenzie

et al., 2008). While the provincial government mandates social justice instruction, it does not provide any supports for teachers to develop the critical consciousness required to facilitate social justice pedagogy. Without supports to help them develop their critical thinking, reflection and pedagogy, educators are left on their own. They must fully implement the curriculum and deal with the emotional reactions of students as they learn uncomfortable truths about inequities and injustices in society. What is missing is research investigating models which provide practical, cognitive and emotional support for educators involved in social justice pedagogy. These models should help teachers develop a critical consciousness and understanding of social justice and strengthen their ability to help others have similar experiences.

Teacher leaders in Manitoba are provided with very little training to assist them with their leadership. Although much is known about the knowledge and skills teacher leaders require to be effective and the learning processes which can assist teachers to acquire this knowledge, few programs exist which offer these learning opportunities to teacher leaders. More specifically, there is no research which explicitly brings together the topic of teacher leader preparation and social justice. Research is needed which focuses on how teacher leaders, uniquely positioned as boundary spanners, capacity builders and change agents, can lead for change. This research needs to build upon the work of Crowther et al. (2009) to identify the specific skills teacher leaders use to facilitate conversations with their colleagues, and deepen their understanding and commitment to social justice.

The research literature does not provide any clear suggestions about how to develop teacher leaders who understand their local context and are capable of leading for

social justice. There is research on preparing pre-service teachers to teach for social justice and there is research which identifies how to develop new administrators to lead schools for social justice. While much can be learned from examining the content, structure, and lessons learned from these programs, teacher leaders are positioned differently than pre-service teachers and aspiring administrators. Teacher leaders are not necessarily interested in moving into administrative positions and are certain to have more teaching experience than pre-service teachers. Because of their different position in schools, teacher leaders require different preparation and support in their leadership roles. Research is needed which closely examines the general nature of this support, and the more specific qualities required when the purpose of the leadership is to promote growth and progress towards improved levels of social justice in schools.

Given the gaps in social justice and teacher leadership, a leadership development program designed to meet the needs of teacher leaders for social justice will address a number of gaps in the literature. Specific gaps to be addressed through this research are a) how participating in an ongoing network of peers can support social justice teachers; b) how teacher leaders develop critical consciousness; c) the influence of leadership theory on teacher leaders' practice; d) what facilitation skills teacher leaders find most effective for promoting social justice dialogue with peers; and finally, e) what factors contribute to the agency of teacher leaders as change agents for social justice. The overall purpose of this research, to develop a leadership development program to support teacher leadership for social justice, is in itself a response to these gaps in the literature.

In the next section I present the conceptual model developed for this dissertation, which integrates the significant concepts and theories presented in this review of the

literature, and applies them to addressing the gaps identified in the literature. The conceptual model describes the leadership development cohort I aimed to develop through this research. The salient features of this leadership development program support its intent to foster the development of teacher leadership for social justice.

Conceptualizing a Teacher Leadership Development Model

The conceptual model I developed for this dissertation responds to the gaps I found in the literature on developing teacher leaders for social justice. The framework also reflects what I have determined from the literature on social justice, teacher leadership, and leadership development to be the essential elements of an effective leadership development program. Figure 6 displays my conceptual model for a leadership development program to develop the ability of teacher leaders to lead for equity and social justice. In the upcoming pages, I explain the significance and source of each of the elements in the diagram.

Level one of conceptual model. The first level of the conceptual model (Figure 6) focuses on establishing a cohort of teacher leaders to participate in the study. One facet of level one describes who should be recruited for the teacher leadership for social justice cohort. The second facet describes the qualities the individuals who should be selected.

Teacher leader cohort. The center section of level one (Figure 6) is entitled Teacher Leader Cohort. I designed the program to include a small cohort (centre) that would meet together over time to dialogue, reflect, envision, learn and investigate leadership for social justice. In addition to having current leadership responsibilities, participants in this leadership development program would also be expected to enter with strong personal commitments to social justice and understandings of some of the ways in

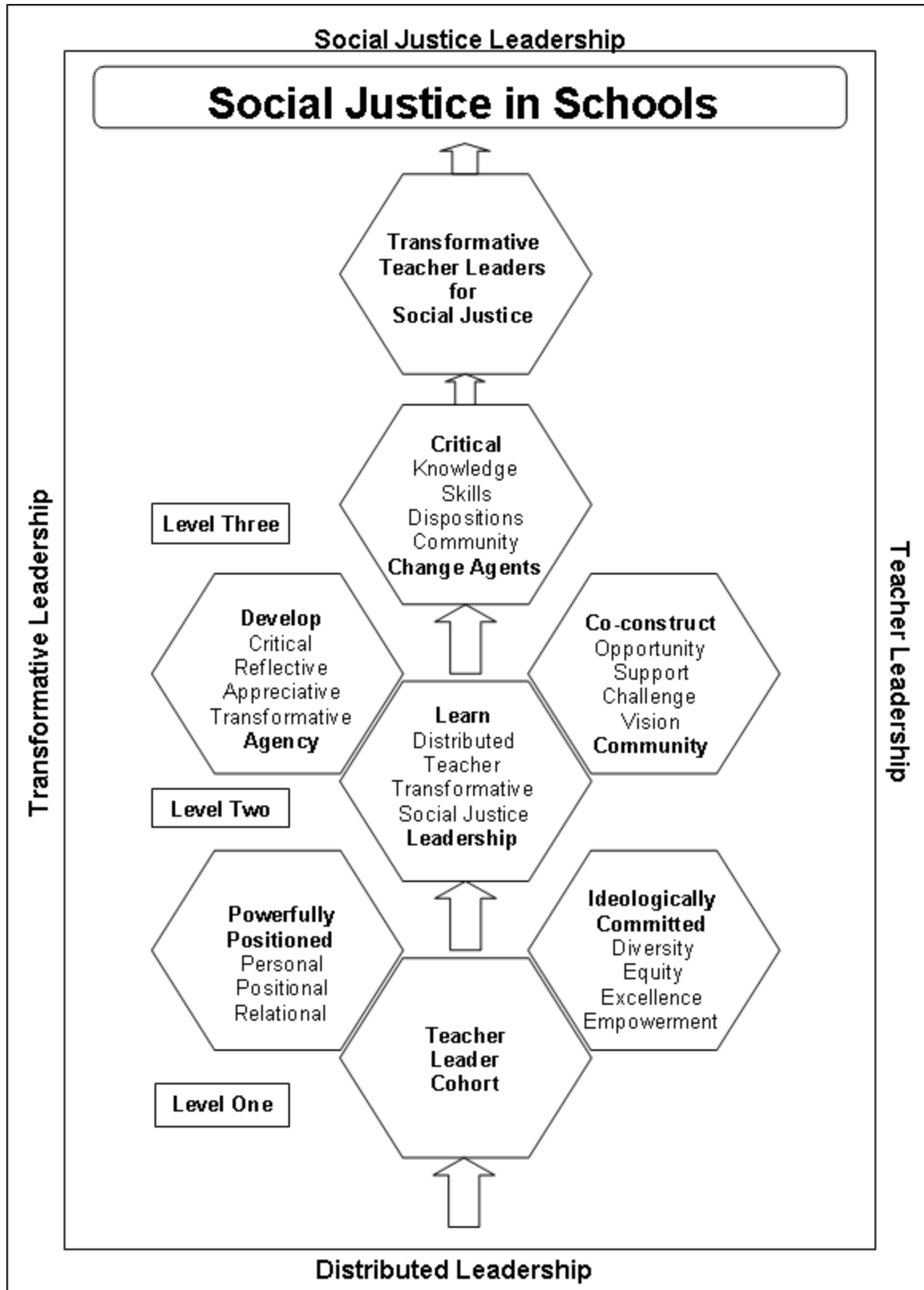


Figure 6. Conceptual model for developing teacher leaders for social justice.

which inequities are reproduced in schools.

Powerfully positioned teacher leaders. Figure 6 level one's left side, entitled Powerfully Positioned, describes the characteristics of participants for the proposed leadership development program. I chose to focus on teacher leaders as change agents due to their personal, positional and relational connections in schools. These qualities determine their potential for influencing colleagues, in particular, but also school administrators, parents, students and other community members. Teacher leaders would enter into the leadership development program with a strong experience base in pedagogy, relationship building, inter-personal communication and leading groups or teams.

Ideologically committed teacher leaders. To lead for social justice, teacher leaders must be personally oriented towards social justice principles. On the bottom right side of level one of Figure 6, is the phrase Ideologically Committed, along with four qualifiers. Based on the literature I reviewed on social justice frameworks, these four criteria could be used to narrow down the pool of teacher leaders who might participate in the program to those with ideological commitments to social justice. I define ideologically committed teacher leaders as those with a positive disposition towards diversity, equity, excellence and empowerment. Being committed to diversity means taking a deliberate stance in support of the right of all children to be educated in their local school. Being concerned about equity means you choose to stand with the least privileged and most marginalized groups (Brown, 2004) in the school community. A commitment to excellence means having high expectations for everyone in the school and a clear understanding of what constitutes excellence in teaching. If one is committed to

empowerment you help members of marginalized groups to speak up and claim their voice. The leadership development program envisioned provides teacher leaders who demonstrate ideological commitment to social justice with the knowledge, experiences and skills they need to lead change for social justice from within schools. Next, I examine each of these four individual commitments in further detail, beginning with diversity.

Diversity. Being committed to diversity includes possessing key beliefs or orientations. Diversity advocates take a deliberate stance in support of the right of all children to be educated in their local school, often referred to in the field of education as inclusion. This stance may involve resisting the forced relocation of students for any number of reasons such as intellectual or physical disability, behavior, socio-economic status, race or sexual orientation (Forest & Stainback, 1989; Katz, 2012; Katz & Mirenda, 2002a, 2002b). A second dimension of diversity is interpreting cultural and linguistic differences between students as rich assets and resources to be explored for the benefit of all learners (Kugler & West-Burns, 2010; Nieto, 2000, 2010). When viewed from a broader perspective, these types of strategies build on students' strengths, such as a student's first language, rather than focusing on their area of weakness. Being committed to diversity also includes a belief in differentiation strategies to meet student needs (Tomlinson & McTighe, 2006). Teacher leaders committed to diversity demonstrate these fundamental beliefs through their daily interactions with students and parents and when they raise related issues in conversations with colleagues. Diversity educators focus on positive actions the school can take which will demonstrate respect for each student and the community (Dweck, 2006). Another way teacher leaders frame their respect for individual students is through a belief in equity.

Equity. As indicated earlier, being concerned about equity means you elect to stand with the least privileged and most marginalized groups (Brown, 2004) in the school community and speak against issues of inequity as they arise. Teacher leaders with strong commitments to equity speak up when they notice people “seeing only deficits”, “erasing race and culture”, “rationalizing bad behavior” and “norming the negative” (Skrla et al., 2009, Table of Contents). Educators who are committed to equity believe it is the school’s responsibility to reach the learners and that if students aren’t learning, both teachers and the school need to look at their practice, not blame students or the community. Equity educators are optimistic in their orientation (Kincheloe & Steinberg, 1995), believing in the possibility of change. Shields stresses equity educators must acknowledge “differences in children’s lived experiences” (2004, p. 110) because when we assume everyone’s personal lives are similar, she argues, we render some children and their families’ lives invisible. Teacher leaders who are committed to equity express their commitment through the questions they ask, the issues they are concerned about and the people with whom they dialogue about those issues. Advocating for equity necessitates clearly defined understandings of excellence in education.

Excellence. A commitment to excellence means having high expectations for everyone in the school (Murphy, 2010). All teacher leaders need to have a clear sense of what constitutes excellence in teaching and hold themselves to a high standard (Seashore Louis et al., 2010). They also need to be able to articulate those visions to others to help build their understanding of what constitutes quality in areas like teacher-student relationships, classroom management, ethical behavior, inclusive settings, effective assessment techniques or instructional leadership (Lieberman & Miller, 2004). Teacher

leaders committed to excellence have a vision of what excellence means in a variety of educational areas, can articulate their vision, and engage others in pursuing excellence (York-Barr & Duke, 2004). This commitment to involving others in generating appreciative responses to diversity, and the pursuit of excellence and equity, reflects the fourth belief sought for in participants, which is empowerment.

Empowerment. Teacher leaders who believe in empowerment help members of marginalized groups to speak up and claim their voice (Brown, 2004). They reject paternalistic relationships with marginalized people and instead act as supporters and champions of students, parents, communities, and colleagues whose opinions are not being heard. Working for empowerment means working *with* others rather than *on* or *for* them (Griffiths, 1998). In fact, one could argue that empowering others is at the very heart of the work of teacher leaders. In their role as capacity builders, teacher leaders act to empower their colleagues to contribute to the school in meaningful ways (Katzenmeyer & Moller, 2009). If one believes in diversity, equity, excellence and empowerment, then one strives to empower others to act in ways which are in keeping with these beliefs (Crowther et al., 2009).

I have now articulated four ideological orientations for teacher leader participants in the leadership development program. These four beliefs of diversity, equity, excellence and empowerment, are presented as the critical elements for a social justice orientation, yet clearly this interpretation has limitations. Social justice is a much more complicated concept, intimately connected to specific socio-cultural and sociopolitical contexts and to individual perspectives which make it difficult to reduce to four words. Realizing this, my intent is to frame the positive, inclusive, ethical and just worldview that I argue is a

necessary underpinning for teacher leaders to be able to enact change for social justice in schools.

In this first section which introduces the conceptual model I intended to guide the leadership development sessions with participants, I presented my rationale for focusing on teacher leaders and the structure of the leadership development program. I explain that participants would need to be in some type of leadership position during the program and be ideologically committed to social justice, which is defined as belief in diversity, equity, excellence and empowerment. The literature indicates that to be effective, teacher leaders need leadership development to strengthen their ability to lead change (Crowther et al., 2009; Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004). I turn now to the leadership knowledge embedded in the proposed leadership development program.

Level two of conceptual model. Level two of the conceptual model (Figure 6) describes the curricular content for the proposed leadership development sessions divided into three sections. The center section, entitled Learn Leadership, identifies the leadership frameworks participants should be exposed to during sessions. The left side, entitled Develop Agency, identifies the skills and processes participants should experience and learn to facilitate. The right side, entitled Co-Construct Community, describes the features of the cohort community to be created in collaboration with participants.

Learning about leadership. The leadership content is found in the centre of level two of the diagram, entitled Learn Leadership (Figure 6). Based on my review of the literature, I see that to be able to lead for social justice, teacher leaders need to learn about four specific leadership paradigms that can inform their work. These important leadership paradigms are teacher leadership itself (Crowther et al., 2009; Katzenmeyer &

Moller, 2009; Lieberman & Miller, 2008; York-Barr & Duke, 2004), distributed leadership (Leithwood & Mascal, 2008; Yukl, 2010), transformative leadership (Bass, 2010; Burns, 1978; Kose, 2009) and social justice leadership (Brown, 2004; Cooper, 2009; Shields, 2004, 2010; Theoharis, 2007).

Teacher leadership. Teacher leadership literature (Crowther et al., 2009; Katzenmeyer & Moller, 2001, 2009; Lambert, 1998, 2003; York-Barr & Duke, 2004) and my experience in teaching post-baccalaureate courses in teacher leadership, suggest that teacher leaders are often unfamiliar with the theory behind teacher leadership. It is important that participants develop understandings of what teacher leadership is, what teacher leaders do, what kind of impact they have and the challenges they face in their work. As indicated earlier, teacher leadership is considered by many scholars to fit into the distributed leadership paradigm in which leadership is shared amongst various members of the school community (Leithwood & Mascal, 2008; Yukl, 2010). Exposure to distributed and teacher leadership theory would help teacher leaders understand their role in the school and value any work they could do to develop the leadership capacity of their peers.

Transformative leadership. Transformative leadership, as described by Bass (2010), refers to leadership which motivates and engages others in working towards change. Transformative leadership involves leading with vision, empowering others and doing so through challenging and collaborative processes (Yukl, 2010). Kose (2009) brings transformative leadership to life through his multi-site case study of three transformative principals who lead professional development for social justice. Teacher leaders could learn from studying the work of Kose or others (Ross & Berger, 2009;

Cooper, 2009; Shields, 2004, 2010; Theoharis, 2007, 2008), what transformative leadership can look like in school settings.

Social justice leadership. Social justice leadership (Brown, 2004; Shields, 2004, 2010; Theoharis, 2007, 2008) involves applying ideological commitments to leadership tasks. Social justice leaders are openly ideological, committed to principles of equity, diversity, excellence and empowerment and strive to work with communities towards creating learning environments for all students which reflect these principles. The aspects of each of these leadership paradigms which are most relevant to teacher leadership for social justice are summarized in Table 1. Along with understanding these four leadership paradigms, teacher leaders need to develop critical understandings of leadership processes through developing a critical consciousness.

Table 1

Leadership Paradigms

	Distributed Leadership	Teacher Leadership	Transformative Leadership	Social Justice Leadership
Description	Decentralized leadership	Leadership from within	Collective empowerment	Openly ideological
Intent	Opportunity Broad participation, multiple input	Support Build on expert & referent power	Challenge Change orientation, capacity building	Vision Diversity, equity, growth, empowerment
Method	Multiple leadership opportunities, shared ownership	Change agent, boundary spanner, capacity builder	Vision, collaboration, empowerment	Challenge inequities, reject deficit thinking, side with marginalized
References	Lambert; Leithwood & Mascall; Yukl	Crowther et al.; Lieberman & Miller; Katzenmeyer & Moller; York-Barr & Duke	Burns; Kose	Brown; Cooper; Shields; Theoharis

Note: This table was inspired by Shields (2009, p. 56).

Develop agency. On the left side of level two (Figure 6) is the section labeled Develop Agency. This section contains two different components. The first is to develop a critical consciousness and the second is to learn to facilitate transformative learning.

Developing critical consciousness. Within the section entitled Develop Agency (Figure 6), are the types of critical perspectives that are imperative for teacher leadership development programs. Participants in a leadership development program need to understand the relationship between social justice and critical thinking and have time to develop their own critical consciousness. The critical aspect of social justice work acknowledges that power and privilege are unequally distributed in society and that teachers work within school systems which perpetuate inequities (Apple, 2004). Three strategies which can help people develop critical consciousness are critical pedagogy, critical reflection and dialogic action. Each of these three critical approaches can be used to interrogate dilemmas that arise as a result of teacher and student positions in schools. These three skills are fundamental to developing a critical consciousness.

According to critical theorist McLaren, “Critical pedagogy is fundamentally concerned with understanding the relationship between power and knowledge” (2009, p. 72). Critical pedagogy refers to education which “understands that people around the world constantly have to deal with modes of oppression emerging from dominant power” (Kincheloe, 2008, p. vii). Critical pedagogy has been most strongly associated with Brazilian literacy educator Paulo Freire (1970), and his published ideas about adult education for conscientization and emancipation. Critical pedagogy entails reflecting on ways in which our work is influenced by the larger society and exploring how critical thinking can help us understand and strengthen our teaching.

Critical reflection involves a variety of purposes, skills and practices. Preskill and Brookfield (2009) believe critical reflection includes reflection *in practice* and *on practice*, but that it is only critical if it is associated with critical purposes. They assert that communities can learn to reflect critically so that looking at issues of justice, power and agency become the norm. Preskill and Brookfield advise that critical reflection includes asking hard critical questions, but also being gentle, hopeful and responsive. Brown (2004) believes the purpose of critical reflection is social action, and that it requires examining not only personal and professional belief systems but also the ethical implications and effects of practices (p. 89). Critical reflection, as a community-based practice, has the potential to deepen understanding of the complexity of pedagogy in varied settings. The process by which we make meaning of our reflection is through collaborative dialogue.

Dialogic action is another term most commonly associated with Paulo Freire (1970), who connects critical thinking and dialogue, “True dialogue cannot exist unless the dialoguers engage in critical thinking ... thinking which perceives reality as process, as transformation, rather than as a static entity...” (p. 92). Marshall (2009) moves from Freire’s theoretical stance, to a more pragmatic position, asserting that what is needed is to “create spaces for discourse ... within their workspaces, classrooms, offices, hallways, and other arenas” (p. 141). Preskill and Brookfield (2009) affirm this stance and challenge educators to create open dialogic spaces, in which analyzing experience can build a collective sense of agency, clarify social and political issues, and become part of reflection and action loops. Brown (2004) supports this notion asserting that critical reflection involves questions, challenges and counter-arguments.

The structure of the leadership development cohort is modeled on both communities of practice (Lave & Wenger, 1991) and Critical Friends Groups (National School Reform Faculty). A community of practice (CoP) is a combination of people, activities and the context they share over time and in communication with other similar groups. Effective CoPs provide strong social and interpersonal support for group members as well as cognitive stimulation, two important elements in a positive learning environment (Lave & Wenger, 1991). Critical Friends Groups come together monthly to “meet voluntarily, collaborate across disciplines, reflect on their work, confront assumptions; and problem solve.... Critical Friends Groups, could provide structures to facilitate educators’ justice and activism work” (Marshall, 2009, p. 168). Other potential dialogue techniques which could be adopted in the program include talking practice groups, critical incident analysis and storytelling (Preskill & Brookfield, 2009). Grumet (1995) connects dialogue to curriculum: “Curriculum is never the text, or the topic, never the method or the syllabus” but rather “the conversation that makes sense of ... things. ... It is the process of making sense with a group of people of the systems that shape and organize the world we can think about together” (p. 19).

Critical conversations with colleagues, which involve critical reflection on practice and an awareness of power structures in which teaching occurs, can lead to increased understanding of pedagogical practices and the teaching and learning dynamics present in classrooms and influencing leadership. The critical practices articulated here can assist educators to develop stronger social justice frameworks. More importantly they involve participants in critical learning processes in the role of learners. This personal

experience will support participants as they learn to facilitate these types of learning experiences with colleagues.

Learning to facilitate transformative learning. Still in level two (left) (Figure 6) are the words reflective, appreciative and transformative agency. Agency, as described earlier in this chapter, is when a person believes they have the ability to create change. One area of essential learning for teacher leaders is to develop agency through learning the prerequisite leadership skills for facilitating transformative learning (Mezirow & Associates, 2000). The four components of transformative learning are critical reflection, a disorienting dilemma, experiencing disequilibrium and reaching resolution. Leading transformative learning requires a leader who is skilled in thinking critically and facilitating critical reflection processes (Preskill & Brookfield, 2009). Facilitating transformative learning around social justice issues requires teacher leaders to apply some of the critical concepts introduced in the critical consciousness section. They would need to be engaged in exploring their own social identity (Kose, 2009), systemic discrimination issues such as cultural reproduction (Apple, 2004) and how to theorize about inequities. A suggested approach here would be to have teacher leaders explore some critical theory (Apple, 2004), critical pedagogy (Giroux, 2004; McLaren, 2009) and learn about participatory action research (Stringer, 2013). This critical analytical background would assist teacher leaders to bring a systemic perspective into discussions about what impacts student learning.

One additional type of facilitation skill relevant for teacher leaders is how to lead appreciative inquiry. Appreciative inquiry involves reflecting on current practice to identify what approaches are working well, and then brainstorming about how more of

these approaches proven to be effective could be incorporated into their future work (Hart, Conklin & Allen, 2008; Reed, 2007). An appreciative inquiry into achievement gaps in performance would involve looking at the environments in which these students excel, singling out the important features of these learning environments and then identifying ways to adopt some of those teaching techniques in other subject areas. Teacher leaders are well situated to leading appreciative inquiry because of their insider positions. As a teacher in the school with a broad perspective, they often have a good sense of which teachers are experiencing success with particular groups of students and can tap into those strengths during the inquiry process.

It is very challenging to learn to lead appreciative inquiry and facilitate transformative learning. The expectation that teacher leaders will develop an understanding of the ways in which the educational system perpetuates inequities as well, places a great deal of responsibility and challenge on the shoulders of these teacher leaders. Developing change agents with this skill set is an ongoing process. It is clear therefore that when I envision this leadership development process, I am picturing a comprehensive multi-faceted leadership development process during which facilitation skills will continue to develop over a long period of time. For this type of deep personal and systemic change to be initiated and sustained, there are a number of systemic supports that need to be in place.

Co-constructing a community of support. On the right side of level two (Figure 6), under the heading Co-construct Community, are four specific types of systemic supports which must be provided for teacher leaders to be successful in leading for social justice and these are opportunity, support, challenge and vision.

Opportunity. Opportunity to lead for social justice is afforded through distributed leadership environments. For a teacher leader to be effective in leading for change they require opportunities to provide leadership and develop their skills. Formal teacher leadership opportunities with peers need to be valued by school leaders and sufficient time must be allocated for teacher-facilitated dialogue to progress beyond the initial idea generation phase. Teacher led activities must be protected from being “bumped” by other pressing issues, and both participation and leading such groups must be considered important aspects of a teacher’s professional learning. Informal opportunities for leadership may be seized voluntarily, appear spontaneously or be deliberately created through innovative and imaginative thinking. For maximum growth to be experienced through participation in a leadership development program, participants should be actively engaged in providing informal or formal leadership. Identifying potential opportunities for providing leadership and creating change could emerge through engaging in dialogue with other participating and supportive teacher leaders.

Support, challenge and vision. Support, challenge and vision are the key components of Lipton and Wellman’s (2003) mentoring program which focuses on building learning-focused relationships. The main principle is that through developing learning relationships, effective communities provide cognitive challenge, facilitate vision articulation and provide emotional support.

Supporting teacher leaders would involve designating time for them to meet as a group to share their leadership experiences with each other. Hargreaves and Fullan (2009) endorse the relational value of networks as a strategy for creating change, “the art of spreading change is about building new relationships as much as disseminating new

knowledge" (p. 35). Preskill and Brookfield (2009) believe that by listening to the stories of co-workers and championing co-workers' goals, we are able to support the growth of others. The success of the leadership development program will depend upon the extent to which educators have the opportunity to talk about their practice, discuss whatever facilitation strategy or dilemma is on their mind, and engage in critical reflection with like-minded peers.

Jansen's (2009) insights from post-apartheid South Africa are that dialogue may be risk-tolerant or risk-accommodating, but is never risk-free. Jansen advises leaders to recognize teachers and principals as emotional actors. In pursuing social justice issues, leaders and learners become aware of injustice in the world and can become paralyzed as a result. Educators need time to talk about experiences, to overcome the most common response to burdensome knowledge which is guilt and shame. Helping teacher leaders to move past these emotions into accepting responsibility for action, will require clear ground rules for conversations and an atmosphere of trust and challenge. A further form of support would involve setting up a mentoring system through which I would mentor teacher leaders individually by engaging them in learning-focused conversations (Lipton & Wellman, 2003) about their leadership. The value of and need for this type of support reflects the teacher leadership theory presented earlier as well as other related research on teachers' professional learning (Blank et al., 2008; Steiner, 2004) .

Challenge is the second aspect of Lipton and Wellman's (2003) framework. When Lipton and Wellman advocate the need for challenge in learning-focused relationships, they do not mean confrontation and conflict, but rather cognitive challenge. To be able to engage others in transformative learning, which is a cognitively challenging process,

teacher leaders need to have the opportunity to experience and participate in this type of learning themselves on a regular basis. Challenge can also be introduced by introducing a facilitator from outside of the group.

Vision is the final aspect of systemic supports required for these teacher leaders. Vision involves having a sense of direction and intent. Over time and collectively, these teacher leaders would participate in visioning and clarifying activities to allow them to envision inclusive equitable learning environments in detail and describe their characteristics. The theoretical literature on social justice leadership was helpful in this process of defining and clarifying a vision for socially just learning environments. This collective visualizing supports the teacher leaders in being able to work effectively towards social justice in schools. It provides them with a sense of hope and purpose, without which the work would be too challenging. Provided with the opportunity to lead, the support of colleagues and mentors, cognitive challenge to one's own thinking, and a collective vision, teacher leaders for social justice could have sufficient and appropriate supports to lead change effectively in the area of social justice. I have now identified four ways to provide sustainable support for developing teacher leaders. These approaches are: having opportunity to provide leadership, providing support through group dialogue and individual mentoring, providing cognitive challenge in a supportive atmosphere, and finally ensuring opportunities to develop personal and collective visions of socially just and equitable schools.

In this section on leadership development for teacher leaders I have expressed the need for a multi-pronged approach to supporting teacher leadership development. Those prongs are learning about leadership paradigms, learning to facilitate critical,

transformative and appreciative learning, and, finally, having access to the appropriate systemic supports for ongoing learning and growth. It is these three components which all teacher leaders for social justice require to become critical change agents within school systems. When developing the conceptual model, I anticipated teacher leaders would experience growth in a number of specific domains as a result of participating in this leadership development program.

Level three of conceptual model. The third level of the conceptual model (Figure 6) only has one section entitled Critical Change Agents. This segment of the model articulates the outcomes I anticipated for program participants.

Anticipated participant outcomes. In level three (Figure 6), the outcomes I anticipated of program participants as a result of their participation in a leadership development program are listed. They fall into the four areas of knowledge, skills, dispositions and community.

Knowledge. It would be anticipated that participants in a program would exit with an increased knowledge base about leadership, social justice and ways to create change.

Skills. As participants in this leadership development program would enter with individual skills unique to their beliefs and experience, they likely would also exit the program with varying levels of skill. They would have experienced critical, reflective, appreciative and transformative learning, initially as learners, and increasingly as leaders. They would possess the ability to analyze situations alone and with others, to identify inequity and envision paths towards improving equity in schools. They would have developed expertise in facilitating dialogue amongst adults to engage people in examining issues of equity and power in schools.

Dispositions. It could be anticipated that each individual would strengthen their disposition to be a critical change agent as a result of acquiring knowledge of a variety of leadership and social justice frameworks which could guide their work.

Community. Finally, participants in such a program would have the support of a group of colleagues, who share similar convictions, with whom they could develop positive and hopeful visions of the future, refine their leadership practice, challenge their thinking and renew their commitment and passion for social justice. This transformative experience with a group of like-minded peers has the potential to help participants adopt research-based practices for future leadership work which have been proven effective in other environments. In this dissertation, I aim to determine what form of leadership development program has the potential to strengthen teacher leaders' ability to be effective internal change agents for social justice in schools. This conceptual model summarizes the initial plan implemented to achieve this goal.

Summary of Chapter Two

The definition I adopted for teacher leaders earlier in this chapter was, *Teacher leaders, by voicing ethical concerns and facilitating dialogue within diverse learning communities, influence others towards improved practice and strengthen educational outcomes for all learners.* I identify these individuals as transformative teacher leaders for social justice, which reflects their position as teacher leaders, their process of making change as transformative, and the intent of their work as increasing social justice in our schools. The themes used to organize this chapter echo the major themes introduced in my autobiography. This literature review provides a rationale and conceptual model for developing a leadership development program to strengthen the abilities of teacher

leaders to improve socially just practices in schools. I reviewed the literature on social justice, teachers as leaders and leadership development, and I concluded that portion of the chapter by identifying gaps in the research literature. Lastly, I provided the conceptual model for the dissertation. This model is a synthesis of what I learned from the literature about promising practices and a response to what I perceive to be inadequacies in the scholarly record on teachers as leaders of social justice reform.

In Chapter Three, I provide a description of the research methodology and theoretical framework which I reason has the strongest potential to generate comprehensive responses to my research questions. I present the four research questions and explain their relationship to the intent of my research, which is to identify a model for leadership development which has potential to strengthen teachers' ability to lead social justice reform in schools.

Chapter Three: Research Methodology

Chapter Three Overview

In the previous chapter I linked the literature on social justice, teacher leaders and leadership development with my conceptual model for this dissertation. In the conceptual model, I outlined the components of the leadership development program I envisioned as contributing to the development of teacher leaders for social justice. In this chapter, I restate the research questions which guided this dissertation and share the decisions I made regarding the research methodology and identify the theory which guides the action research process. Each decision represents what I found to be the most effective approach to determining answers to my four research questions. A summary is provided at the end of this chapter. Since the research questions are at the core of each and every methodological decision I make, I begin by restating the four research questions.

Research Questions

The four research questions guiding this dissertation and all methodological decisions are:

1. What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?
2. In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools?
3. How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice?

4. What leadership development model enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools?

These four research questions focus on the experiences of the teacher leaders who would engage in the leadership development program outlined in the conceptual model. Since the research questions focus on the individual and collective experiences of participants in a cohort program designed to develop change agents, a qualitative participatory action research methodology is an appropriate methodological choice. In the next section I provide a description of each research method and explain my decision to adopt qualitative participatory action research.

Research questions which focus on peoples' experiences, call for research approaches which capture their thoughts, feelings and interpretations in a variety of ways. Qualitative research can guide future practice if it provides sufficient information to allow readers to visualize and relate to the setting in which experiences take place. Qualitative researchers meet this need by providing rich and thick description of the phenomenon, the context in which it occurred and the ways in which it is experienced by various individuals. This dissertation focuses on teachers' experiences in a leadership development program and aims to guide practice by producing a program design with the potential to develop teacher leaders for social justice. Accomplishing this goal requires that the research be carried out using qualitative approaches.

Qualitative Research

Qualitative research focuses on observing behavior in natural environments and capturing participants' experiences through interviews, observations, and documents or

artifacts. Denzin and Lincoln (2005) describe qualitative research as both grounded in reality and transformative:

Qualitative research is a situated activity that locates the observer in the world. It consists of a set of interpretive material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including field notes, interviews, conversations, photographs, recordings, and memos to the self.... qualitative researchers study things in their natural setting, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them. (Denzin & Lincoln, 2005, p. 3)

Denzin and Lincoln describe clearly how qualitative research happens in natural environments, and focuses on observational and linguistic, rather than quantitative, data collection techniques. According to Creswell (2007) there are four paradigms in qualitative research: postpositivism, social constructivism/interpretivism, advocacy/participatory and pragmatism. This study adheres to the tenets of social constructivism/interpretivism because of its focus on constructing meaning with others and the interpretive process used in data analysis. It also reflects an advocacy/participatory (or transformative) paradigm because it has an action and emancipatory intent, and is recursive, dialectical and collaborative. This transformative paradigm is reflected in the overall purpose of the study, the selection of an action research methodology and the design of the leadership development sessions.

This dissertation focuses on developing change agents in a cohort of teacher leaders, who engage in collaborative, dialectical and participatory processes, aimed at strengthening their ability to lead for social justice in schools. The collaborative nature of

this study, along with the focus on creating change, suggests that a collaborative action research approach might further strengthen the qualitative research methodology described so far. In the next section I explore action research and its suitability for the focus of this dissertation.

Action Research (AR)

Action research is a methodology which focuses on seeking practical action-oriented solutions (Stringer, 2013). Teachers use action or practitioner research to investigate ways to improve their own teaching. Action research is typically done in a series of action cycles of look, think, act, reflect, (adapted from Lewin, 1946; Stringer, 2013) with each cycle representing a new attempt to find or refine an effective solution to the problem posed. Herr and Anderson (2005) observe that often action research follows a common procedure in which a researcher first conceives of an intervention and then cultivates shared ownership and design with participants. McNiff and Whitehead (2002) refer to this as the shift from an i-inquiry which is personal, to a c-inquiry which is collective. The data gathered in action research focuses on both process and outcomes, and data analysis takes place throughout the study so as to inform the intervention on a continual basis (Herr & Anderson, 2005). For action research to be considered effective, it must lead to an action which resolves the dilemma under study, as well as contribute to the broader educational community. Action research can use quantitative, qualitative or mixed methods of data collection to document both process and products and can incorporate varying degrees of collaboration between participants and researchers.

Participatory Action Research (PAR)

Participatory action research (PAR) is an offshoot of both action research and collaborative research. Collaborative research refers to approaches which involve the members of a community in the research. PAR is used internationally for professional and organizational development as well as curriculum development (James, Milenkiewicz & Bucknam, 2008). Traditionally in PAR, community groups are incorporated into both research and evaluation activities and are active participants in generating research questions and searching for their answers. McIntyre (cited in Herr & Anderson, 2005) categorized her research with a group of white teachers as PAR even though she generated the research questions and designed the research. She found PAR appropriately described her research because it focused on the experiences of human beings, had an activist stance and an emphasis on social change (p. 100). Similarly, James et al. suggest adopting PAR to work with groups of teachers in schools and engaging school-based collaborative groups of learners as co-researchers.

PAR is uniquely suited to working with communities of learners and engaging members in group learning and data-driven decision-making. PAR's collaborative elements help build and strengthen communities of practice and provide quality professional development which can "leave practitioners motivated and energized to create needed change by involving them in the study and improvement of their own practice" (James et al., 2008, p. 11). Communities of practice (CoPs) (Lave & Wenger, 1991) are associated with PAR and both are described as democratizing and engaging participants in the problems that they face. Both CoPs and PAR can lead to an "increase in participants' professional capacity and control over their own situations" (Zuber-

Skerritt, 1992) and an increase in their “collective capacities for transformation” (Kemmis & McTaggart, 2005, p. 598).

PAR considers both context and content and its results are locally relevant. The methodological outcomes of PAR are to develop professional capacity, to promote a level of focus that leads to long-term engagement with the issues, to develop local expertise, and to leave the practitioners more motivated and energized than before it began (James et al., 2008, p. 11). PAR is also highly recommended as a tool for studying adaptive change: “PAR studies deliberately engage the people who do the work to create the change ... these people inform the decisions that influence their school environments” (p. 17). All of these goals are suitable for the study being described here; the participants in the CoP will be teacher leaders, the goals are to prepare them to be change agents and part of their role will be to facilitate communities of learners in their schools. The opportunity to experience PAR as a participant, by participating in a PAR project aimed at creating social justice leaders will support teacher leaders’ ability to facilitate CoP and PAR in their own schools and develop their sense of agency as leaders of change. This research also has the potential to extend its influence beyond strengthening participants’ skills by contributing to the literature on leadership development, change agency and teacher leadership.

Reflective practice is a key component in PAR. Its components are: debriefing, discussion of feelings and thoughts, discussion of next steps and identifying new possibilities or ideas. This process can be individual or collective and is driven by the regular and habitual use of a reflective journal (James et al., 2008, p. 61). For Kemmis

and McTaggart (1988) the focus of reflection in PAR is critical in nature and best done in collaboration. In PAR there is a balance between research and action:

Within PAR , strategic inquiry process and research methodology are so close that they seemingly merge. Within the wider context of educational research, PAR contains both a continuum of methods and a focus on the cyclical process of research and action. (James et al., p. 13)

As this quotation indicates, PAR is more than a method of collecting data. It is a way of engaging with group members to co-investigate and co-discover effective ways to contribute to change in schools. According to Kemmis and McTaggart (2005), PAR is: social, participatory, practical and collaborative, emancipatory, critical, reflexive, and aims to transform both theory and practice.

Nygreen (2008) “reconceptualize[s] PAR as a tactic within a politics and ethics of critical research for social change” (p. 30). In PAR, the researcher is a participant in this process as well. As the researcher in this PAR study I was a part of the investigation and decision-making along with other group members, while having ultimate responsibility for ensuring the research was ethical and well designed. My position as researcher was not particularly privileged however, and this could have been problematic as I was the only one for whom the completion of the research was important. In the interests of full disclosure this need was shared with participants at the outset of the study. Nygreen advises that researchers not assume, as she did, that adopting PAR will take care of all the issues of power in a research study. She found that while she was engaged in her dissertation work for an academic audience, this influenced her relationship with the other participants and issues of power, scope and authorship became

very important. Similarly in another action research project (not PAR) Timperley (2006) found that the school teacher leaders did not realize that it was their learning that was the focus of the action research study. She advises making the focus of the study very clear to participants in action research studies.

PAR was chosen as the methodology for this study for a number of reasons. PAR is designed to be enacted within a group that is focused on resolving real-life issues; it focuses on identifying local solutions with applicability beyond; it develops capacity and expertise within participants; it strengthens communities of practice; and finally it leads to results which address the issues driving the research. The similarity between the approaches of PAR and quality professional development also lends strength to this decision. I needed to be careful to address the issue of power in PAR and to not assume that the methodology would take care of those issues of power that are present in all research relationships. The qualitative approach to data collection was appropriate to measure the small increments of change that were anticipated in this study and the small size of the sample group. As mentioned earlier, change for social justice is a slow process and success was measured in small shifts in thinking and practice. For this reason, although participants may choose to adopt quantitative methods in their leadership work, I did not collect quantitative data.

For this dissertation, PAR was used for knowledge generation, improving and critiquing practice, professional transformation and potentially organizational transformation or development. The cohort model was critical in this process because it had the potential to engage participants in ongoing professional reflection and dialogue regarding their personal practice. The collaborative model also had the potential to reveal

participants' insights into their experiences providing leadership in the organizations in which they work.

To this point, I have shown that AR is a good match for this initiative due to its focus on group learning processes, its action orientation and its potential to develop local expertise and capacity. This study embodies characteristics shared by what some refer to as PAR, a specific genre of AR. Its suitability for this dissertation is further clarified by examining the ontological and epistemological theories which underpin this study. The theoretical framework which is shared in the next section supports both the research methodology and conceptual model. This framework outlines, in particular, how the collaborative cohort design used in the study is integral to its purpose, which is to learn how to best develop teacher leaders as change agents for social justice.

Theory Framing the Action Research Process

In the previous section, I identified qualitative participatory action research as the most suitable research methodology for this dissertation. In addition to what I have already indicated, this choice was well suited to the study because of particular ontological and epistemological positions. This theoretical framework presents the ontology and epistemology of how I envisioned transformative change occurring for participants in the leadership development program and in their schools.

McNiff and Whitehead (2010) strongly advise action researchers to openly declare the personal values that drive their research. The critical ontology on which I based this study, is that all we can ever really know is what we understand and interpret from another's experience. All communication is filtered through our own interpretive and experiential lenses, therefore what every participant, including myself as researcher,

would come to know or understand through the course of the study would be expressed and interpreted through our individual perspectives. In this study, what participants shared, what they did, how they reflected and how we as a group, or I as an individual interpreted such actions, was subject to interpretation through our particular values, beliefs and perspectives. My best effort to be neutral has still been insufficient because neutrality does not exist; each of us is influenced by our multiple membership in various identity groups. Although I adopted strategies which compensate for and mitigate against overreliance on a single perspective, the dissertation is no doubt influenced by my position as a white, urban, middle-class, middle-aged educated woman. All research is limited because it represents our best efforts as researchers to represent the truth that we understand.

Epistemology on the other hand, or how we come to know, is less subjective and more circumstantial. What I took into consideration in my research plan was the adult learning theory which helps to explain how people learn to improve and develop their practice. Adults learn through dialogue with others, through reflecting on both our own and others' work, through applying frameworks as lenses through which to view our practice, through feedback, and finally through experience. Although change strategies cannot be proscribed that will be effective in all circumstances, the likelihood of an individual contributing to change can be strengthened through developing their knowledge, skills, behaviours and commitment. These skills are most effectively developed in a supportive collaborative environment which supports risk-taking, problem-finding and problem-solving approaches. Understanding this learning process

underscores the leadership development focus of the study rather than direct instruction of specific leadership strategies used by teacher leaders for social justice.

The theoretical framework which I chose for this dissertation supports this epistemology and has three components: critical constructivism, reflective practice and change theory. Each of these topics will be introduced and connected to the conceptual framework for the study. Critical constructivism is a combination of critical theory, social constructivism and complexity theory. Critical constructivism helps identify the ways in which people make sense of ideas through dialogue (social constructivism), how all communication is influenced by power (critical theory) and the synergistic potential that can develop within groups (complexity theory). Reflective practice looks at the value of reflecting on one's practice as well as the characteristics of learning-focused conversations and learning-focused relationships. These learning-focused relationships exist between the facilitator and participants, between participants, and between participants and the colleagues for whom they are providing leadership. Relationships are strengthened through learning conversations in which the facilitator attempts to strengthen the ability of the conversation partner to reflect critically on their work. Change theory connects to the ways in which I envisioned participants being influenced to alter or refine their leadership practice, as well as the understandings participants would need to be able to strategically work towards change in their school environments. In this theoretical framework section, I draw connections between each of these theories, the design of the study, and the ways learning and change were likely to occur throughout the leadership development program and participants' action research cycles. I begin with

critical constructivism, which is a combination of critical theory, social constructivism and complexity theory.

Critical constructivism. Critical theory, based on the work of Apple (2004), Giroux (2004) and McLaren (2009), argues that social institutions such as schools replicate the inequalities of the societies in which they are situated. Schools tend to favour the same people who are privileged in broader society. Simplistically speaking this means able-bodied, white, heterosexual males are more likely to experience success in schools because our educational approaches and our pedagogical techniques are designed to be effective for those who have traditionally had the most power in society. This study operates from the assumption that principles of social justice provide a useful framework to help overcome the inequities in society that are replicated in schools. A critical approach means that different supports may need to be provided to particular individuals to ensure they have an equal chance of being successful. This premise that different approaches may be required to achieve equal outcomes underpins the very foundation of the study.

Social constructivism, based on the work of Dewey (1938) and Vygotsky (1979), states that people create meaning through dialogue. In his zone of proximal development, Vygotsky includes understandings that are a little too challenging and out of conceptual reach for an individual. With the assistance of social peers, that individual is able to progress through this zone towards more sophisticated understandings and insights superior to those that would be reached alone. This study incorporates social constructivism in the dialogic nature of the leadership development group and the focus on transformative learning.

Complexity theory has grown out of the field of biology where effective and durable ecosystems are those that demonstrate biodiversity; the greater the diversity the stronger the ecosystem. Complexity theory links the self-organizing ability of organisms to the interactions between members of a group:

In complexity theory it is posited that no part controls the behavior of the system as a whole and that the relationships between the parts produces systemic qualities that are difficult to anticipate. Complexity theorists describe such systems, both physical and social, as emergent and self-organizing. (Kincheloe & Berry, 2004, pp. 36-37)

Not only do groups create results which are emergent and self-organizing, they also “give rise to characteristics not to be found in any of the individual parts” (Kincheloe, 2005, p. 27). Thus complexity theory suggests that groups often outperform the capabilities of their best individual members (Davis & Sumara, 2006).

Complexity theory characterizes the nature of research with groups as complex, influenced by multiple emerging and changing contexts, and interpreted and enacted out by individuals who are themselves socially situated. It takes into account the multiple roles, identities and contexts in which humans operate. The researcher, sometimes referred to as a bricoleur, must respond to the complexities of each situation, and learn “to negotiate emerging situations, complex processes, multiple contexts, and accelerating social change” (Kincheloe & Berry, 2004, p. 47). While managing such diverse inputs, it is inevitable that the researcher’s values and assumptions will influence the research and the forms of knowledge that are produced. Complexity can also be extended one step further, into all forms of communication: “Every aspect of human knowing – also known

as interpretation – is linguistically filtered, contextually grounded, power-saturated, implicated in a particular social process, shaped by particular narrative forms, and inscribed by tacit theories about the nature of reality” (Kincheloe & Berry, 2004, p. 87). Complexity theory, therefore, interprets both verbal and non-verbal communication as challenging and socially situated. As the researcher for this study, I worked collaboratively with a cohort of teacher leaders interested in furthering their leadership skills to lead for social justice. According to Davis and Sumara (2006), complexity theory is particularly suited to collaborative inquiry settings:

Developments in complexity science ... seem to be fitted to those research methodologies that are explicit and deliberate in their desires to effect and document transformations in group and collaborative settings – including, perhaps most prominently, action research and related participatory approaches to inquiry. (Davis & Sumara, 2006, p. 135)

Levin (cited in Davis & Sumara, 2006) indicates the connection between PAR and complexity theory is appropriate for research which focuses on cooperative models which emphasize relationships, narratives and dialogue. The dissertation undertaken here closely fits this description.

As mentioned earlier, critical constructivism combines critical theory, social constructivism and complexity theory. Critical constructivism can be thought of as a theory which brings together these particular approaches to ontology and epistemology. Critical constructivism draws connections between personal and social transformation: “Critical constructivists understand that thinking in a new way always necessitates personal transformation; if enough people think in new ways, social transformation is

inevitable” (Kincheloe, 2005, p. 49). Critical constructivists understand they are influenced by the political, social and historical circumstances they experience, similar to what I explored in my autobiography in Chapter One.

Through its hybrid approach, critical constructivism focuses on discourse, diversity and power. Discourse is understood to be influenced by the principles of social constructivism as well as the power relations between discussants. Diversity, as indicated earlier under complexity theory, refers to the strength of diversity in ecosystems. Power reflects the notions explored under critical theory, that power dynamics found in groups nearly always echo power dynamics in the larger society. In saying that this study is informed by critical constructivism I indicate that I am aware that all interpersonal communication within the study is influenced by a variety of societal and interpersonal factors. For this reason I cannot make any claim to neutrality as a researcher and need to present my results as tentative and subject to multiple interpretations (Kincheloe, 2005). Participants and myself as researcher bring our personal histories with us, and they determine how we make sense of our experiences. One of the ways in which we together tried to make sense of new ideas and personal experience was through reflective practice, the next focus in my theoretical framework.

Reflective practice. The second theoretical base for this study is the one that is very significant in terms of the conceptual model of the study. Reflective practice is defined as “The practice of periodically stepping back to ponder the meaning of what has recently transpired ... [Reflective practice] privileges the process of inquiry ... probing to a deeper level than trial and error experience” (Raelin, 2002, p. 66). York-Barr et al. (2006) present a theory of action for reflective practice with a three-pronged focus: “Our

theory of action involves thinking about goals, thinking about beliefs, and thinking about practice” (p. 11). They further describe reflective practitioners as those who “consider issues of justice, equity and morality as they design and reflect on their practice” (p. 16). In this study participants reflected on these same issues: they were asked to set goals for social justice and teacher leadership through implementing action research, challenged to confront deficit thinking about colleagues and students, and encouraged to work towards justice and equity.

In describing reflective practice, York-Barr et al. (2006) categorize individual, partner, team and school-wide reflective techniques. For the purpose of this study, the first three techniques are all relevant. Teacher leaders would be asked to reflect individually through reflective journals, given time to reflect in partners at group sessions and also to meet with the researcher for learning-focused conversations. Partner reflection was selected because it has been found to lead to “increased feelings of professional and social support and decreased feelings of isolation at work” (York-Barr et al., 2006, p. 21). The dominant form of reflection however would take place with the group. According to these authors, reflecting with a group can be particularly valuable: “An emerging sense of hope and encouragement that meaningful and sustained improvement in practice can occur, given group members committed to working and learning together” (p. 22). Group reflection could also generate energy within the group: “As the internal capacities of teachers to learn and make a positive difference are recognized and harnessed, a collective sense of efficacy and empowerment emerges” (Marks & Louis, 1997, 1999, cited in York-Barr et al., 2006, p. 14).

One of the variables that influences the power of group reflection is the presence of what York-Barr et al. (2006) refer to as *positive deviants*: “Positive deviants are people whose behaviour and practices lead to solutions to problems that others in the group who have access to exactly the same resources have not been able to solve” (p. 17). The teacher leaders described in this study could be considered positive deviants due to their positive outlook, their efficacy in their teaching roles and their interest in creating change for social justice.

Kincheloe (2004) identifies types of knowledge teachers can have, the most sophisticated of these is what he refers to as reflective-synthetic knowledge which is “the knowledge that emerges from individuals who reflect on and synthesize multiple types of knowledge to make appropriate decisions about educating and education” (York-Barr et al., 2006, p. 19). The impact of teachers who are able to synthesize a variety of information sources and share that insight with others is powerful, and allows educators “... to perform our jobs in more informed, practical, ethical, democratic, politically just, self-aware, and purposeful ways” (Kincheloe, 2004, p. 62). York-Barr et al. have found that individuals who have opportunity to participate in multiple forms of reflective practice are able to contribute to others’ success with reflection: “A critical mass of individuals who have experienced positive outcomes from their own reflective practice and from reflection within groups and teams can better support widespread adoption” (p. 20). I anticipated that participants would strengthen their ability to advocate for and stimulate reflective practice, as a result of their experience with the cohort.

The theory of reflective practice as articulated by York-Barr et al. (2006) follows a seven step process which guided this research. Their process begins with a pause, then

an attitude of openness, followed by inquiry, thinking, learning, and finally action which leads to enhanced student learning (p. 9). Their model is theorized to build strong networks of support in schools for vulnerable populations. Strong school networks would also enable schools to respond to multiple challenges in ways which are ethical, effective and compassionate and lead to positive change (p. 26). In the next section I present approaches to change which influenced the research design and epistemology adopted for this dissertation.

Change theory. Well known change scholar Michael Fullan (2008) says the process of creating change is ongoing, dynamic and highly social. The two to four year change process Fullan describes has three components: initiation, implementation and institutionalization. While this is a common way to conceptualize change, Spillane (2009) and Wagner et al. (2006) say this process starts too late. Spillane recommends spending time on diagnosis of the problem first and developing a theory of action before beginning to initiate change. Wagner et al. advocate two important steps in the change process, preparation and envisioning, that need to occur before the stage they refer to as enactment. All steps are geared towards establishing a culture of inquiry and the prerequisite attitudes to support it. Apart from the earlier starting point and the emphasis on preparation for change, what distinguishes Wagner et al.'s (2006) process from Fullan's (2008) is the emphasis on the social and dialogic relationships between different groups of people and strategies emerging through dialogue and hypothesizing at all levels. Teacher leaders are more likely to be facilitating these type of problem-finding and problem-solving conversations with colleagues, as opposed to imposing change strategies on others that they have developed in isolation.

Kelley and Shaw (2009) define leadership as “a social process involving shared problem solving in a community of learners” (p. xiii). Their three part conceptual framework, called *Learning First*, involves socio-cognitive leadership, the dimensions of leadership for learning and levers of change. Socio-cognitive leadership focuses on what leadership processes are followed. The dimensions of learning identify where leaders focus their attention: advancing equity and excellence in student learning is the focus, which is pursued through building teacher capacity, aligning resources, and engaging the community. The levers of change indicate how leaders work to transform schools and include three levels: the individual leader, the organization and the community. One of the advantages of this change process is that the decision-making process they advocate, which they call socio-cognitive leadership, is adaptable to decisions at multiple levels.

Lastly, Smith (2011) is a relevant theorist whose work provides a conceptual framework for talking about and conceptualizing change. Smith created the framework to reflect the processes used by schools he and his colleagues have evaluated for the National School Change Awards. They identify three catalysts that provide impetus for school change: internal dissonance, external factors and leadership. Internal dissonance refers to disagreement or conflict between divisional employees. External factors can be either *push in* or *reach out* factors. Push in factors include pressure from government or community members to improve the effectiveness of schools. Reach out factors include applying for grants, funds or awards that can stimulate change in a school. Choosing to participate in this research study could be interpreted as a reach out strategy by teacher leaders interested in responding more effectively to issues in their school. During the study, participants brought to group sessions examples of internal dissonance or external

push in factors that are impacting their work in schools. The three pronged approach to change advocated by Smith focuses on context, capacity and conversations. Smith's discussion of context echoes the importance of local factors (Wagner et al., 2006). Seeing conversations as critical is an idea which builds on the social nature of change mentioned by Wagner et al. and Kelley and Shaw (2009). Smith specifically mentions the use of CoPs and dialogue, elements which are present in the works of many other theorists, as well as recommending action research as a strategy for creating change. Smith's final contribution is a caution to change facilitators to make sure that the intended changes are meaningful and substantial; deep, systemic and broad; focused on students, teaching and learning; and have measured outcomes or solutions. The first two, meaningful and substantial, and systemic and broad, are significant in that very little of the literature talks about the importance of focusing on deep and meaningful change. Smith's framework incorporates many though not all of the desirable attributes of the previous processes.

Given the recommendations for creating change and their relative differences and unique attributes, I decided to use a combination approach adopting some strategies from each of the identified theories. From Fullan (2008) I took the focus on action, on change as a process and capacity development as the key task. Spillane (2009) contributed the need to diagnose and theorize about problems and the types of change that would be effective before beginning. Wagner et al. (2006) contributed the need to prepare by envisioning change, and using CoPs to develop a culture of inquiry wherein hypothesizing and dialogue are valued social endeavors. Kelley and Shaw (2009) helped frame change as shared problem solving, established equity as a key dimension of learning, valued sociocognitive leadership, and developed the ability of all stakeholders

to learn from critical reflection. Finally, Smith (2011) helped us understand the catalysts of change, detailed nuances of capacity development, the importance of conversations, and most importantly the need to pursue changes which are deep, meaningful and substantial.

In this section, I show how critical constructivism incorporates the purpose of the study and the nature of complex and generative learning in group situations. Reflective practice provides the process for how people connect new ideas to their personal actions for creating change. Finally, change theory identifies key processes for change agents to understand and utilize in their work.

Summary of Chapter Three

In this chapter I provided the theory which frames this study exploring leadership development for teacher leaders committed to social justice through a community of practice dedicated to that purpose. In the next chapter, I apply the principles and practices of collaborative action research and this theoretical framework. I apply my conceptual model for developing teacher leaders for social justice to the research design used for this dissertation.

Chapter Four: Research Design and Methods

Chapter Four Overview

In this research design and methods chapter I provide specific decisions I made with regards to the methods associated with the implementation of this study. In keeping with the principles of critical and action research, each of these decisions was understood to be formative and subject to change as required by feedback from participants, the needs of the study itself or observations from the field as the research progressed. The sections into which I organize this research chapter are: tool development; recruitment; leadership development sessions; delimitations and limitations of the study; researcher's position; data collection, analysis and interpretation methods; ethical considerations; and, finally, trustworthiness and validity. Following this description of the research design, I then end with a summary of Chapter Four. I begin this portion of the chapter on research design and methods by examining the process I followed to develop and validate two of my research tools.

Tool Development

In preparation for conducting this cohort based research study I developed a 75 item fixed response instrument which would be used to foster participants' self-knowledge, promote self-reflection and awareness of school context. This tool, known as the Social Justice Teacher Leadership Self-Assessment (SJTLSA), was inspired by a number of well-established instruments in the field, none of which fully satisfied my needs for the study. The process I followed to develop and validate this tool is described fully in Chapter Five and included developing a prototype and validating its contents through three focus groups and pilot testing. The ways in which I used this tool during

the study will be described briefly in further sections of this chapter and more fully in Chapter Eight. The tool development was conducted concurrently with participant recruitment.

Recruitment

To qualify for recruitment, potential participants were asked to have five years of teaching experience, a positive orientation towards social justice, an informal or formal leadership role and sufficient time to devote to the leadership development program. My intention was to constitute a cohort with gender balance and a diversity of teaching assignments, teaching experience, geographic location and cultural backgrounds. I reasoned that employers would view the study as a professional development opportunity for their staff. To ensure there would be no financial barrier to participation I secured funds to cover the costs of travel, catering, and substitutes who could release teachers from their classroom responsibilities.

A number of different sampling techniques (Miles & Huberman, 1994, p. 28) were employed to identify participants for the study. Theory based sampling indicated that I should recruit teacher leaders with a personal commitment to social justice (Bell McKenzie et al., 2008). Maximum variation supported recruiting participants with varying backgrounds, leadership interest and teaching position. Random purposeful sampling ensured I consider teachers who had taken a post-baccalaureate course in teacher leadership with me in previous years, and those teacher leaders with an expressed interest in social justice leadership. This latter group included educators nominated by educational organizations such as the Manitoba Teachers' Society (MTS) and the Manitoba School Improvement Program (MSIP). Finally, opportunistic sampling made it

possible for teacher leaders with awareness and a strong interest in the study to put their own names forward for consideration. Towards the latter stages of the recruitment process I also engaged in strategic recruitment to diversify the cohort and recruit participants whose areas of interest were not represented.

Potential participants were informed of the study by email and given an opportunity to indicate interest. Participants who indicated interest and met the criteria were invited to participate. My goal was to recruit eight to ten participants to ensure at least six would continue. This number of participants would be large enough to allow for diversity yet small enough to build collegiality. When there were too many volunteers in any one division, I consulted school principals for help prioritizing and assessed potential participants' social justice orientations through a conversational (Marshall & Rossman, 2011) interview in which I posed questions around the four criteria for social justice identified earlier as diversity, equity, excellence and empowerment.

For both principals and teachers, the total number of days (six) out of the building was the biggest concern during recruitment and the most common reason individuals hesitated or chose not to participate in the study. A number of participants were attracted by the emergent nature of the study. The biggest challenge with regards to participants was securing their firm commitment to participate in the study. Nine of 14 divisions approached gave me permission to recruit participants. Of the approximately 35 teacher leaders nominated, 25 were invited to participate.

Table 2 summarizes the make-up of the cohort at two different points in time. The "Cohort" is the group of eight that participated in the study from September 2012 until May 2013. The "Revised Cohort" shows how the composition of the group changed

when a new participant joined the group in the third session. After the second session, one participant asked if it would be possible to include one more participant in the study. After careful deliberation and consultation with critical friends I made the decision to include the new member in the study. I believed the benefits for the individual teacher and the group outweighed the possible negative impacts of introducing a new member to the group. The recruitment process can be considered successful as all nine cohort members were committed participants throughout the study and there was no attrition.

Table 2

Cohort Composition at Two Points in Time

Time	# Divisions	Teachers	Grade Level	Position	Other Areas of Responsibility
Cohort (Sept.)	7 Divisions 3 Urban 4 Rural	8 Teachers 6 Female 2 Male	2 Elem. 1 Middle 6 Senior	5 classroom 2 resource 1 counsellor	3 teacher association 2 special area groups
Revised Cohort (Nov.)	7 Divisions 3 Urban 4 Rural	9 Teachers 7 Female 2 Male	2 Elem. 1 Middle 7 Senior	5 classroom 2 resource 1 counsellor 1 support	3 teacher association 2 special area groups

Of the sampling strategies employed, the most successful was the random purposeful nominations by organizations. This is significant as the organizations involved had not previously participated in recruitment for a doctoral research study. Their participation required careful negotiation and consultation to make sure we were staying within the privacy regulations of each organization and the research and ethics board. When I received approval for a division I would notify the organizations who then submitted names of potential participants. The second most productive recruitment method was opportunistic sampling through self-nomination. This technique allowed participants to join a study they perceived would be personally beneficial. The multiple

sampling approaches were effective in combination, establishing a strong and diverse cohort of teacher leaders to participate in this action research study (Table 3).

Table 3

Cohort Recruitment Sources

Participant Referral Source	Number of Participants
Organization nominated	5
Self-nomination	3
Strategic recruits	3
Superintendent nominated	2
Teacher leadership contacts	2
Nomination by participant	1

Note: Some participants were referred by more than one source.

Once the Teacher Leadership for Social Justice Cohort was recruited I began planning for the leadership development sessions.

Leadership Development Sessions

Consistent with the expectation that action research happen in a series of action loops or cycles (Stringer, 2013), there were different phases to the leadership development program. Figure 7 indicates the steps in the process: Orientation Session, Sessions One to Six, a final Validation Session and ultimately the Leadership Development Model. The arrows connect each of these steps in the process to suggest movement and the influence of findings from one stage on subsequent stages.

I began with an evening Orientation Session, June 14, 2012, at which time potential participants had a chance to get to know one another. I provided an overview of the study, answered questions and participants signed their letters of informed consent. Following some discussion we agreed upon a consistent and centrally located meeting

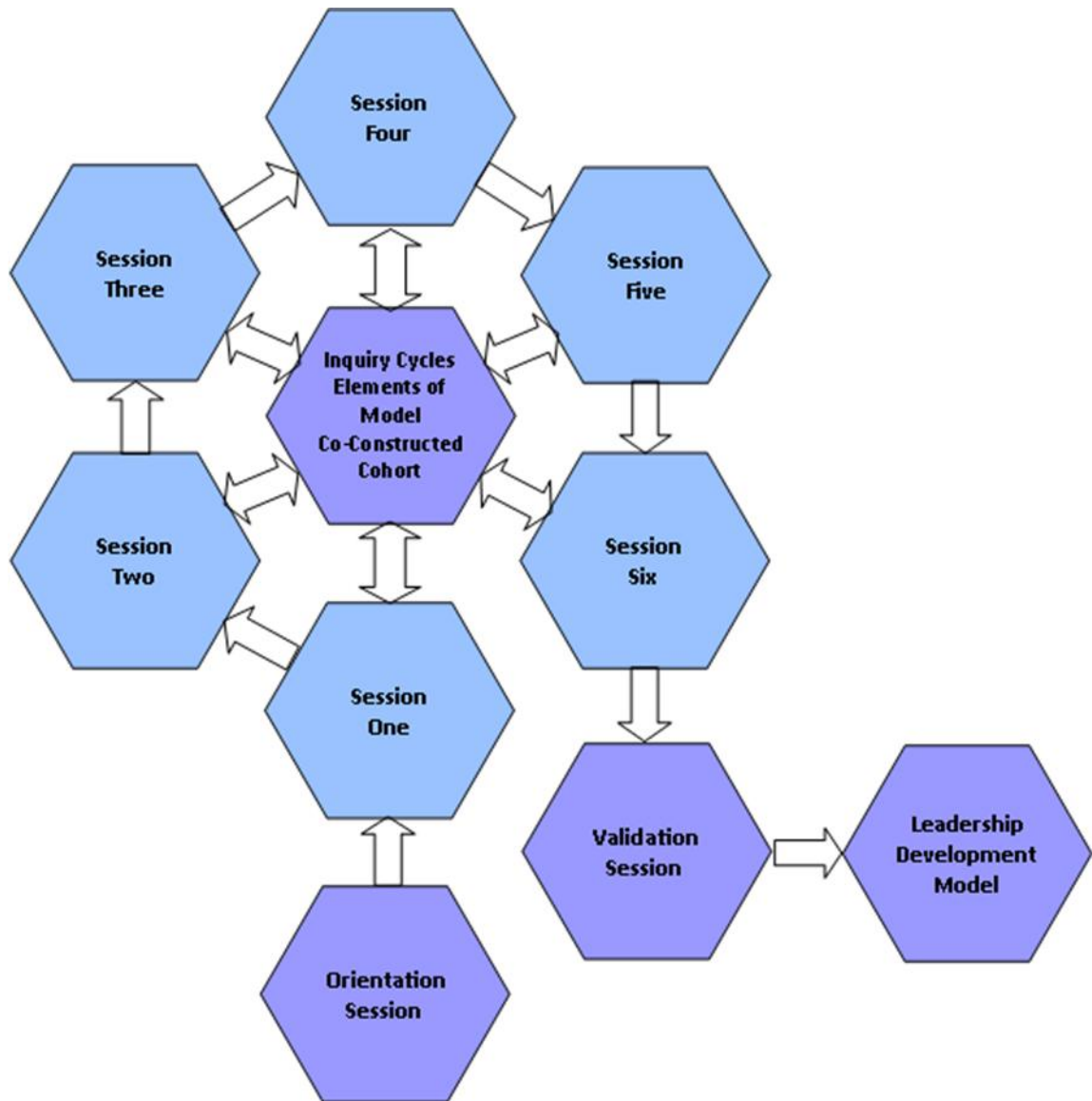


Figure 7. Leadership development session design and sequence.

place and set dates for six full-day sessions between September 2012 and March 2013 at three to eight week intervals. The intervals were planned to be short enough to establish an ongoing community of practice yet long enough to allow participants time to progress with their action research. Establishing firm dates far in advance was appreciated by school administrators and ensured illness was the only barrier to full attendance at all sessions.

The second phase visible in Figure 7 includes the six leadership development sessions themselves. At the center of the six sessions are three headings which show how the first three research questions fit into the organization, design and structure of the leadership development sessions. The first heading, *Inquiry Cycles*, refers to the action research methodology I followed, in which analysis of data collected during each of the leadership development sessions contributed to the design and content of subsequent sessions. The inquiry cycles were one data source which informed my response to the first research question focused on the knowledge, skills and dispositions of teacher leaders as change agents (see Chapter Seven). The second heading, *Elements of Model*, refers to the second research question in which I aim to determine the ways in which specific elements of the leadership development model assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools. The specific elements of the model incorporated into the leadership development sessions are: journals, action research cycles, learning-focused conversations, dialogue, self-assessment, peer feedback and critical reflection (see Chapter Eight). The third heading, *Co-constructed Cohort*, refers to the third research question in which I aim to determine how belonging to a co-constructed community of practice assists participating teacher leaders to acquire the knowledge, skills and dispositions required to lead for social justice (see Chapter Nine). The two way arrows connecting these three headings to each of the sessions indicates the reciprocal relationship between the sessions and the research questions. The research questions informed the design of the sessions and my analysis of data emerging from the sessions informed my responses to the research questions.

At the start of the first leadership development session I communicated my intent, orientation and researcher positionality for the leadership development sessions explicitly for participants through a design frame. Lipton and Wellman (2011b) have found that facilitators of effective groups develop a detailed frame which sets “expectations and context for productive group work” (p. 36). The six components they recommend for an effective frame are purpose, outcomes, boundaries, intentions, benefits and logistics. The design frame developed for the leadership development sessions to ensure clarity of purpose and intent correlates closely with this recommended structure (Figure 8). This design frame was shared with participants at the beginning of Session One and revisited in Session Four to verify that the leadership development sessions were adhering to the declared intentions.

To monitor my facilitation of the six sessions and document process, content and decision-making, I moved through ten data collection and analysis procedures for each session. In preparation for each session I developed the researcher’s action research cycle, the session agenda, the facilitation guide and the researcher’s checklist. During and after each session I gathered the participants’ response to activities (videotaped and later transcribed), written participants’ reflections and the researcher’s reflections. Following each session I developed a logic model, session summary and cumulative themes based on my data analysis. This ten step inquiry cycle allowed me to stay focused, critical and reflective throughout the research process. A detailed description of each of the ten steps and how I used them to study my facilitation of the leadership development sessions can be found in Chapter Six.

Session One Design Frame

Our **purpose** is to develop our effectiveness as teacher leaders who are agents of change for social justice.

By the end of our time together this year we should:

- be more confident and skilled in our leadership roles;
- have increased our knowledge of leadership;
- have improved our skills in facilitating groups;
- have deepened our understanding of and commitment to social justice; and
- have acquired a community of support for our ongoing work.

The **outcomes** for our time together include acquiring knowledge and skills related to teacher leadership for social justice as well as developing relationships and co-constructing a community in which we can do visionary thinking.

You can **expect** the six days we have committed to spend together as a group to be focused on social justice, teacher leadership, facilitation skills, action research, reflection, dialogue and critical examination of practice. You will have the opportunity to: choose the focus of your action research; and provide critical feedback and input into the decisions we make as a group. You have the right to be critical, to question, to have your confidentiality respected and to choose not to participate at any point in time.

My **intention** is to carefully plan **strategies and processes** which will help facilitate critical conversations. I plan to participate in the cohort as a co-researcher and process designer and to encourage a gradual release of responsibility for decision-making to the group. I think it is important that your **time** be well spent, that the **space** we share be open but not always comfortable, that we provide sufficient time and space for reflection, and that we develop **trust** among the group so as to allow us to go deeper in our thinking and be more vulnerable.

I **encourage you** to:

- Be tenacious advocates for your own learning (speak up, get your needs met, offer suggestions)
- “Create a space conducive to reflection and thinking” (turn off cell phones, try not to multi-task, carve out the space for yourself)
- Value the time we have together and carve out time for each other

“**Community** offers the promise of belonging and calls for us to acknowledge our interdependence. To belong is to act as an investor, owner, and creator of this place. To be welcome, even if we are strangers. As if we came to the right place and are affirmed for that choice” (Block, 2008, p. 3).

Block, P. (2008). *Community: The structure of belonging*. Williston, VT: Berrett-Koehler Publishers. <http://site.ebrary.com/lib/umanitoba/Doc?id=10315488&ppg=18>

Figure 8. Design frame guiding leadership development sessions.

Following the completion of the six leadership development sessions, one additional full day session was added to the planned schedule at the request of participants. As well as providing additional time for dialogue and closure, this day served as a Validation Session and was held two months after the sixth session (see Figure 7). I was able to solicit feedback and resolve questions that arose during data analysis. During the afternoon of the Validation Session I conducted a gallery walk with participants. I distributed drafts of Chapters Six and Eight around the room and invited participants to read the sections that interested them and record their thoughts, questions or suggestions on post-it notes or directly on the documents. Cohort members were very engaged throughout this process, focused on what they were reading and thoughtful in writing their responses. I incorporated their comments and feedback into my subsequent analysis and description of the study.

The final step in Figure 7 is the Leadership Development Model, the focus of research question four. The leadership development model developed, tested and refined through this study is designed to enable teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools. What was learned through this process and the model which resulted will be fully described in Chapter Ten.

Delimitations and Limitations of the Study

This research was delimited by the small size of the group involved in the leadership development program. I delimited the study to make it manageable as a doctoral dissertation study. A small group allowed me to be the on-the-job mentor for all participants as I needed to gather data and refine this process as part of the research. For future cohorts I could easily accommodate a larger number of participants by making use

of additional on the job mentors to overcome this limitation. Although I did not have to, I understood that I might have had to exclude some interested participants if travel arrangements or cost made it difficult for them to be physically with the cohort for each group session. Even though I accessed funds to cover costs, I was aware that there were teachers in the province, for example in the northern part of the province, whose participation would be restricted if they had to secure approval from their employer to cover additional costs. I believe my insistence on being physically present during sessions was justified given the heavy emphasis on dialogic practices in the study.

The study was also influenced by the limitations of the research methodology. The time participants had available to commit to the program would be limited due to their full-time teaching responsibilities and additional leadership roles. I planned for forty hours of contact time with the cohort as a group. Individual site visits for observation and learning conversations required an additional ten hours, but this did not involve release time from teaching duties. In combination these two figures brought the anticipated time commitment to a total of fifty hours, recommended as optimal for effective professional learning (Blank, Alas & Smith, 2008; Yoon et al., 2007).

Complexity theory (Davis & Sumara, 2006) suggests that the more diverse the group the more robust the group's learning, however, I was limited in selecting participants from those who demonstrated interest in participating and were supported by their employers to do so. Diversity of the group was not as broad as desirable for a study focused on social justice due to the homogeneity of the teaching profession in general and those who assume leadership roles in particular.

Another significant limitation in this study was my position as researcher. Participants recruited from the post-baccalaureate students who have taken my courses in teacher leadership may have felt some desire to please me, as their former instructor and evaluator. As I was both mentor and facilitator of group sessions, there may also have been some self-censorship influencing participants. This issue was addressed by having as open a process as possible for providing feedback, and providing time for buddy debriefing and collaborative decision-making about group activities. In addition, participants had the option to record personal thoughts in their reflective journal and had access to other opportunities to provide written feedback on the program. To ensure full disclosure I needed to reassure participants that I would not share any of their raw data or personal perspectives with either the funders or their employers.

A potential limitation of this study was the strength-based appreciative stance I adopted as the facilitator of leadership development sessions. I chose to focus on the positive lessons that could be learned from their leadership experiences. In doing so I may have missed out on an opportunity to have participants consider their personal autobiography and deepen their understanding of the ways in which they have experienced personal privilege. This critical approach might have helped participants adopt a more critical anti-oppressive approach in their work (Kumashiro, 2000).

I was a participant in the leadership development program as well, studying my facilitation of the cohort of teacher leaders. In this role I strove to be a co-learner and co-investigator with participants. By demonstrating vulnerability, engaging with participants, and inviting critical reflection on my own leadership and facilitation skills, I reduced the power differential between myself and the other participants. However, there

is always a power differential between participants and the researcher, which may have influenced how the final results are phrased, and how the results are interpreted. This limitation was mitigated by using member checks, critical friends, an advisory committee, collaborative analysis, and the inclusion of outliers or contradictory examples in the analysis (Creswell, 2007; Thomas, 2009).

I have attempted to be as reflexive as possible by demonstrating my own vulnerability within the group by taking turns to share my own struggles with leading the group and maintaining a reflective journal throughout the research. My own experiences and perspectives acquired as a privileged, middle class white woman no doubt have influenced my interpretation, and made it different than what might be interpreted by a researcher who experiences oppression more directly, as a member of a distinct minority group. I am biased towards my own interpretations of social justice and my experiences in inner city schools, these experiences have no doubt influenced my participation and interpretation during this research. Consistent with action (Stringer, 2013) and critical research methodologies (Griffiths, 1998), as the researcher, I needed to show ongoing willingness to be open to shifts in understanding and procedures in response to the wishes of the group and the outcomes of the action research cycles. This flexibility was visible from the outset with participants having as much input as possible into the schedule and location for group sessions and control I exerted over the timing of the job-embedded visits from the researcher.

In this section I have outlined the ways in which I delimited the study to allow it to be as meaningful as possible for the participants yet still manageable for myself as the researcher. I have also identified the limitations of qualitative and action research and

additional considerations related to my position as researcher in the study. Despite these limitations, I believe the study can make a significant contribution to social justice, leadership development and education in general.

As seen in this section on delimitations and limitations, a key role in this research process was that of the researcher, as I fulfilled a number of different roles within the group and with regards to the research. This required a careful analysis of my position as researcher in this study.

The Researcher's Position

As mentioned earlier, I was a participant researcher in this study. This meant that I studied my own leadership and facilitation of the group at the same time as I was studying the impact of the leadership development program on participants. Brantlinger (1997) identifies seven assumptions about the role of the researcher in qualitative inquiries. According to Brantlinger, the nature of research is to be either technical/neutral or critical/political; this study was critical and political in nature in that it aimed to create change and reduce injustice in schools. Second, Brantlinger says researchers can either be distant and objective with their participants or intimate and involved, this second description fits the nature of this study as I was a co-participant learning alongside the teacher leaders. A third descriptor Brantlinger uses is the direction of the gaze with the options being either inner and contemplative or outward towards others; in this study the researcher was gazing in both directions. The gaze was outward toward the learning and experiences of others participating in the leadership development program; the gaze was also inward to examine my own leadership and facilitation of the group. A further assumption Brantlinger identifies is whether the purpose of the research is to be private

and professional or to be useful to the site and the participants. For the most part, this study aimed to benefit the participants and their schools but it would be naive to deny the fact that it also benefits the researcher as it constitutes my dissertation research and provided an opportunity for me to engage deeply in data collection and analysis in order to complete my doctorate. Brantlinger's fifth assumption concerns the intended audience; in this case the study was intended for both the scholarly community and the participants themselves. The researcher's political position constitutes the sixth assumption; not surprisingly the researcher's position aligns with the political rather than the neutral category. The final assumption Brantlinger identifies is what the researcher's views are on agency. With a choice between passive or engaged in local praxis, this study fits the latter category clearly as its whole intent was to develop agency through action in a local context, as well as the broader educational community through disseminating results.

Marshall and Rossman (2011) recommend that researchers identify their level of *participantness*, *revealedness* and either *intensiveness* or *extensiveness*. With reference to participantness I was a full participant and also a participant observer; thus making me an "insider" working in collaboration with "outsiders". Over the course of the group sessions I became less of a facilitator and more of a participant as the leadership devolved more to the group. The intent of the study was fully revealed to the participants. Intensiveness and extensiveness relates to the level of flexibility and openness to change demonstrated by the researcher. As indicated earlier, I needed to remain open to shifts and changes in both methodology and process throughout the study. To build trust with participants I needed to monitor my desire to fill silences with speech, to offer my own opinions and to share what I had learned about teacher leadership (Marshall & Rossman, 2011). This tendency

was particularly strong with one participant who was recruited from the ranks of my own past students and with whom I already had a relationship as instructor.

Developing reciprocity with participants is another key area in critical research (Griffiths, 1998; Lather, 1991). This was done through sharing the decision-making, openly exposing my own errors, being open to change and including the participants in analysing data and providing feedback on my analysis of the data. It was important for me not to violate participants' privacy by sharing more than they felt comfortable sharing about their job-embedded learning and instead inviting them to share what they felt comfortable in sharing.

Data generated through this research varied in form and focus. As I described in my autobiography, I have extensive experience and training in leading learning-focused conversations, mentoring teachers, facilitating groups of educators and working for social justice. This background gave me the theoretical sensitivity to analyze this data with insight and understanding (Strauss & Corbin, 1990). At the same time, my experience may have caused me to overlook details in specific settings because I was accustomed to their presence. Interrogating the data with critical friends assisted me in noticing what I took for granted. The position of the researcher surfaced most prominently in the collection, analysis and interpretation of data, which I now consider in the next section.

Data Collection, Analysis and Interpretation

Qualitative research generally utilizes three forms of data collection: observation, interviews and artifacts (Bogdan & Biklen, 2006; Creswell, 2007; Marshall & Rossman, 2011). This research study was consistent with these recommendations. The data sources and the research questions to which they align can be seen in Table 4. These are

discussed in more detail below along with the specific approaches used for data analysis and interpretation.

Observational data included videotaping of all group sessions, the researcher’s journal and field notes. Videotapes of group sessions were used to analyze both content and process considering participation, topics of conversation, facilitation and modelling, critical reflection and dialogue. The researcher’s journal was used to capture my own observations and reflections about the above listed topics as well as collect memos and

Table 4

Alignment of Research Questions with Data Sources

Research Questions	Data Sources		
	Observation	Interview	Artifact
1. What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?	Videotaped group sessions Researcher Journal Field notes	Focus group video Written peer assessments Participant reflections Digitally recorded learning-focused conversations	Action research cycles Participant journals E-mail communication Curricular and design process notes Self-assessment tool
2. In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools?	Videotaped group sessions Researcher journal Field notes	Digitally recorded learning-focused conversations Participant reflections	Cohort session materials Self-assessment E-mail communication Curricular and design process notes Participant journals

(Table continues)

(Table Continued)

3. How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice?	Videotaped group sessions Researcher journal Field notes	Participant reflections	Action research cycles E-mail communication Curricular and design process notes Participant journals
4. What leadership development model enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools?	Videotaped group sessions Researcher journal Field notes	Focus group video Participant reflections Self-assessment pilot results Self-assessment tool	Conceptual model Self-assessment tool Agendas for group meetings Self-assessment results E-mail communication Curricular and process design notes Participant journals

structured reflections I had about any aspect of the research. Both a structured and unstructured approach was taken to writing the journal to facilitate analysis without losing potentially useful data. Reichert (2010) suggests researchers write in response to specific questions, journal even when nothing is happening, reflect immediately after the events if possible and make sure to date and title every entry. Adopting Reichert's disciplined journaling approach ensured that I responded to each research question after each session and did not lose sight of any potentially useful insights. She also suggests that field notes be used to prompt recall and provide access to quotes and thick

description, thoughts or emotions. I used the transcripts of cohort sessions to create detailed records of each session. Reichert recommends that each entry close with analysis, insights and interpretations. Researcher reflections were dictated using a digital recorder to capture observations of group sessions and individual job-embedded learning conversations that might have relevance for the study. These researcher reflections captured my insights and conjectures about potential patterns emerging in the research. These entries were an integral part of data analysis and used to prompt memories and provide specific observations about the setting and relevant activities.

Interviews were connected to videotaped focus groups and the videotapes of learning-focused conversations between the researcher and individual participants. In addition written participant reflections and peer assessments, conducted in the form of written questions, were considered interview data. Marshall and Rossman (2011) recommend that focus groups with between seven and ten members build on social-constructivism and have high face validity. They recommend focus groups for action research, program design and evaluation, and to help build social support networks. Krueger and Casey (2009) provide recommendations for appropriate questioning routes and researcher positioning to obtain the most honest feedback from participants. Homogeneous focus groups of teachers, administrators and social justice advocates were gathered to provide feedback to revise and improve the self-assessment tool. The videos of the focus group conversations were reviewed initially to identify any new content that should be considered for inclusion in the self-assessment tool. Second, they were reviewed to identify comments about the design of the tool and how it could be revised. The tool was then piloted with two groups of teachers to rule out any challenges and to

ensure that it would accomplish its intended purpose. Any indicated revisions were made at that time. Once finalized, the tool itself was completed by participants and the researcher, at the outset and conclusion of the program as a form of self-assessment. As mentioned the tool reflects current understandings about teacher leadership, social justice and school context. The modified version of this same tool, SJTLPR, was given to two colleagues of each participant for them to complete based on their knowledge of the participants. These peer perspectives provided an additional lens through which to examine the participants' leadership and context. To assess long term impact, a follow-up survey of participants and their peers might be advisable six months to a year after the program.

As a mentor I have received four days of training on leading learning-focused conversations and have over three years of practical experience leading these conversations. Nevertheless, I had a videotaped learning-focused conversation between myself and a non-participant, analyzed by a critical peer (Patton, 2002) using Lipton and Wellman's (2003) criteria for learning-focused conversations, to ensure that I followed the recommended procedures. Initial videotapes of learning-focused conversations were also reviewed to ensure I was following recommended procedures. Once I was confident that my body language and positioning vis-à-vis the participants were appropriate I shifted to using audio-recording in place of video. This documentation strategy proved to be much more efficient and less intrusive than video. The learning-focused conversations focused on participants' action research exclusively. Although I had anticipated revising cohort sessions based on individual feedback voiced during learning-focused conversations, this was not necessary. I did, however, listen carefully for new ideas

especially if they contradicted my own philosophy or beliefs about any aspect of the research. This was an ongoing challenge, to be open to new and varied ways of approaching the research.

Artifacts collected included written reports of the action research cycles completed by participants at each session (including the researcher's own action research cycles), the group session materials, participant reflections, self-assessments, both participants' and researcher's journal reflections, e-mail communication, and curricular and design process planning notes. Each set of artifacts was analyzed for content and activity (Marshall & Rossman, 2011) to look for evidence of changes in practice, identify significant events, and find substantiation for ideas present in other data forms. Any emergent models or frameworks generated through the group process or by individual participants were reviewed as examples of theory-in-action (Argyris & Schön, 1974). The group sessions were analyzed by creating a logic model (James et al., 2008) for each session which identified in chart format the topics covered, their purpose, observations and feedback, as well as the facilitator, the researcher's role and the size of group. It is important to note that most action research, including that of the participants is messy and non-linear (Marshall & Rossman, 2011). Participants completed portions of each action research cycle but often did not complete the entire cycle for a number of reasons such as the strategy proved to be not effective, or the context, goal or participant shifted in some way. Participants were supported to understand that this is both the nature of action research and a benefit, that unproductive paths can be abandoned in favour of more productive approaches. The group session materials, logic model and curriculum and design process notes were useful in quantifying the time required for individual aspects

of the process. Participant reflections were used to capture immediate feedback from participants, and considered as formative feedback that could inform planning for subsequent sessions. Self-assessment responses were used to identify individual priorities and goals and to a lesser extent to capture growth over the period of the program.

Data collection and analysis were ongoing, cyclical and collaborative as recommended for action research (James et al., 2008). Table 5 matches data sources to analysis methods and content; further description of data analysis methods appears in Chapter Six. Creswell (2007) recommends researchers review data completely before beginning analysis to get an overview of the data. The purpose of this is to remove superfluous information which is not relevant to the research questions. I followed this recommendation for each action research cycle. With the quantity of data being collected in this study, this step was very important to ensure I was focused on the important aspects of the data. A second read through the entire data set was done at the end of each cycle to ensure I had not missed any moments of insight. Next I used coding and thematic analysis to consolidate the meaning of the data:

Coding usually consists of identifying ‘chunks’ or ‘segments’ in your textual data ... and giving each of these a label (code). Coding is the analysis strategy many qualitative researchers employ in order to help them locate key themes, patterns, ideas, and concepts that may exist within their data. (Hesse-Biber & Leavy, 2006, p. 349)

I began to identify themes tentatively while reading through the data and once I had firmed up the themes that I felt were present I reviewed all the data to categorize meaningful statements into the identified themes. The second step in the analysis was to

map out the themes that I found in the data through structural coding, matching statements with one of the four research questions. The most significant process followed in analysis was to theme (Saldaña, 2013, p. 175) the data. This involved writing longer descriptions of patterns I was observing across data sources. Saldaña describes a “theme” as “an extended phrase or sentence that identifies what a unit of data is about and/or what it means” (p. 175). These themes functioned as a cumulative and emergent interpretation of findings from analysis of cohort session data and were shared with participants during cohort sessions and revised to reflect their experiences. Ultimately these themes crystallized into the basic structure for answering the research questions. I also analyzed similar data sources across the sessions. This allowed me to look for patterns and contributions of each data source as well as triangulate the data.

Table 5

Data Sources Aligned with Analysis Methods

Observation Data Sources	Analysis Methods
Videotaped group sessions	Logic model Constant comparative Content analysis
Researcher journal	Thematic analysis Content analysis
Field notes Rough transcripts	Thematic analysis Content analysis
Interview Data Sources	Analysis Method
Videotaped focus groups	Content analysis
Written peer assessments	Comparison to self-assessment
Participant feedback	Content analysis
Videotaped learning conversations	Content analysis Structural analysis
Self-Assessment tool	Content analysis Statistical analysis
Self-Assessment pilot results	Content analysis

(Table Continues)

(Table Continued)

Artifact Data Sources	Analysis Method
Action research cycles	Content analysis Thematic analysis
Participant journals	Content analysis
E-mail communication	Content analysis
Curricular and design process notes Facilitation guides Agendas	Content analysis Thematic analysis
Group session materials	Content analysis
Pre and post self-assessments	Pre and post comparison
Self-assessment reflection (SAR)	Content analysis
Conceptual model	Content analysis
Logic models	Content analysis

Written artifacts and journals were analyzed using content analysis: “The term content analysis is sometimes used when the analysis refers to written text rather than the spoken word” (Thomas, 2009, p. 205). I identified the topics participants chose to write about, which ones generated the most attention and did the same for the transcripts of our group sessions. Participant journals were analyzed to identify comments about the program itself, participants’ thinking about transformative learning, social justice, their own leadership and their ability to serve as internal change agents. Data from this source were interpreted somewhat tentatively and needed confirming data from other sources to be considered credible as journal reflections are often speculative. Pre and post self-assessments were reviewed to examine areas of shift and change. I looked at trends in the scores rather than attempting to establish a statistical representation of growth due to the small sample size. I was mostly interested in the interpretive stance of what any shifts meant to the participants. In the final session I asked participants to reflect on their results and interpret why there were or were not gains for each item, and what contributed to those results. I reviewed the themes identified from constant comparison, thematic and

content analysis, in search of answers to the research questions as well to gain additional insights into either the research or the leadership development process. Table 6 aligns the analysis methods with the purpose and outcome of each approach.

Table 6

Analysis Methods, Purposes and Outcomes

Form of Analysis	Purpose	Anticipated Outcome
Read through before and after analysis (Creswell, 2007)	Remove unnecessary information	Ensure focus remains on research questions
Thematic analysis (Hesse-Biber & Leavy, 2006)	Identify themes	Themes per data source, find pervasive themes
Themeing (Saldaña, 2013)	Generate in depth descriptions of phenomena	Generate and share emergent analysis
Logic model (James et al., 2008)	Visual map of each group session	Topics covered, sources of ideas, strategies identified, results
Content analysis (Thomas, 2009)	Categorize content per data source	Topics, emphasis
Self-assessment reflection (SAR)	Explain growth or lack of growth in scores	Participants interpretation of the reasons for the growth or lack of growth
Theory triangulation (Patton, 2002)	Compare findings to theoretical framework and conceptual model	Inform theoretical constructs, identify theory in action
Participant feedback (Carspecken & Apple, 1992)	Opinions and perspectives of participants	Identify potential improvements to program and facilitation of sessions
Crystallization (Marshall & Rossman, 2011)	Multiple perspectives on the data	Identify insights not immediately visible

As a participant researcher I anticipated that my own analysis and facilitation of the program would become part of the discussions at group sessions. In each session I provided a summary of feedback from the previous session, my reflections and the resulting changes in my practice. I invited the group to critique my practice and

interpretation of each session, in written or oral format, whichever they preferred. Accordingly our evolving practices and the considerations which led to them were captured in the various data forms described above. Participants had influence at each stage of the process by responding to each other's tentative observations as well as those of the researcher. I also used data triangulation to look for findings that were reflected in all three forms of data. I used theory triangulation to compare the findings with the theoretical framework and conceptual model (Patton, 2002). The conclusions of the research were discussed with the group and, once again, opportunity to provide feedback in written or oral form either individually or collectively was provided: "People should not be analyzed without having some input into the analysis and the development of theories explaining what they do" (Carspecken & Apple, 1992, p. 549). As the researcher I am responsible for this final report and for balancing the feedback from various participants so that the final version reflects as accurately as possible our collective experience. To accomplish this I have used crystallization which requires using multiple perspectives, both reflection and reaction, self-reflexivity and self-critique (Marshall & Rossman, 2011). These are aspects of ethical practice in critical research, which I consider in the next section.

Ethical Considerations

As researcher I ensured that I secured approval from the Education and Nursing Review of Ethical Board (ENREB) to conduct this research (Appendix A) and obtained written informed consent from all participants (Appendices B & C). All written and digital data was stored in my locked office or home and in password protected computers. Access to the raw data was restricted to the group members and myself. Pseudonyms

have been used for all participants as well as their schools, and no individuals should be identifiable. Following the completion of my final oral doctoral defence all raw data will be destroyed as per university regulations. Doing collaborative AR raises the issue of who gets credit for the research. I have engaged the participants in co-analysis of the data and searched together to articulate findings from the study. Their names however cannot be listed due to confidentiality requirements. I have acknowledged their contributions to the research prominently in this written dissertation without naming individuals and also may invite participants to co-present or co-author academic articles.

Critical research requires strict adherence to additional ethical concerns (Marshall & Rossman, 2011). The relationship between the researcher and participants is very important; attempts need to be made to reduce the distance between the two and to democratize their relationship. My strategies to do so have been articulated in the researcher's positionality section. It was my intention that participating in this study would benefit the participants beyond the satisfaction of contributing to scholarship in the field. Personally they stood to benefit from the professional development and reflection provided through the program, the opportunity to network and dialogue with a group of committed colleagues and the opportunity to engage in dialogue on their leadership with the researcher. The multiple voices of participants have been very important to this study and I needed to be sure to capture various perspectives and refrain from essentializing by making generic statements about teacher leaders or leadership based on the experiences of these individuals. Their experiences in leading for social justice and challenging the status quo in their schools have been difficult and I have needed to be sure to provide ample time for emotional support within group meeting times and to listen carefully to

the challenges they have encountered. This meant overcoming my tendency to be very agenda-focused and task-oriented. I needed to be very careful about confidentiality within the group of participants to ensure that the stories and experiences shared in the group sessions were not discussed outside of that setting without the expressed permission of participants, particularly if they might reflect negatively on the students, school, administrator or division. All participants were asked to agree to respect each participant's confidentiality as part of their informed consent. Concern for ethical research practices is particularly important when the focus of the research is on social justice. It is important that this study model ethical and socially just practices at all levels of decision-making. In addition to ethical guidelines, another way to ensure this research would be conducted in an ethical and just manner was to adhere to the standards of trustworthiness and validity outlined for qualitative and action research.

Trustworthiness and Validity

The design of this study demanded that a variety of different validity standards be considered. The four categories of validity standards sought out for this study indicated recommended practices for social justice research, action research, cooperative inquiry as a sub-category within action research, and transformative teacher study groups. I will identify the particular validity standards adhered to for each aspect of the research.

Research for social justice needs to be judged according to its stated intent. Since the purpose of social justice research is to create change or transformation, then it needs to be judged by the extent to which that change occurs and this judging concerns both research design and implementation. This study meets Creswell's (2007) requirement that critical research must be done "by" "with" and "for", not "on" or "to" participants, and

that researchers pay attention to issues of voice. Griffiths (1998) articulates nine criteria by which critical research should be judged. This study satisfied seven of these criteria because it focused on knowledge and learning, contributed to changing beliefs and values and involved collaboration with the immediate research community. In addition, it demonstrated researcher reflexivity about position and interests, as well as understandings and values; and the research topic concerned taking responsibility for a wider community issue. Finally this research was not put on hold until the perfect conditions presented themselves or the perfect study was designed because “perfection in research is not to be found ... Utopia does not exist!” (p. 97). Robinson (1994) indicates that critical research should arise from causal analysis of a problematic situation, identify new understandings, be modest in size, consider the micro-politics of making change and focus on agency. This study focused directly on agency, which Robinson says critical researchers forget to study; it also analyzed a problem in education, identified new strategies, was small in scope and facilitated looking at the challenges of making change.

Anderson, Herr and Nihlen (1994) suggest five validity standards for action research: democratic validity, outcome validity, process validity, catalytic validity and dialogic validity. Democratic validity refers to whether the research includes all those with a stake in the research being conducted. The democratic validity standard was satisfied because the research incorporated multiple perspectives and was localized. In developing and completing the self-assessment tool, input was sought from social justice activists, teachers and administrators. Outcome validity refers to whether the problem for which the study is developed is answered. Outcome validity required me to stay in the field until I was satisfied I had reached data saturation and believed recommendations

could be made regarding the design of a leadership development program as well as responses to the other research questions. Process validity (construct validity to Lather, 1986) relates to the design of the research and requires self-reflexivity of the researcher, the systematized reflexivity of the design and a central role for theory in the research. Process validity was satisfied by following careful methodological procedures and articulating a comprehensive theoretical framework. Catalytic validity (also Lather, 1986) refers to whether the research motivates others to act. Catalytic validity was satisfied because the research motivated others to make change. This study motivated not only the participant teacher leaders themselves to act for social justice, but also the teachers these leaders work with, their administrators and potentially many more when the study is published or built upon in other locations. Catalytic validity is also evident in the fact the cohort pursued a grant to be able to continue meeting after the study was completed.

Dialogic validity was satisfied by using critical friends and cohort members to help me interrogate the data during the study. This research design also satisfies Reason and Bradbury's (2001) validity standards notably emerging and enduring consequence, plural ways of knowing and relational practice. These criteria were satisfied through the use of multiple interpersonal and dialogic learning strategies during the leadership development sessions, and the thick description provided of the research and interpretative processes. Marshall and Rossman's (2011) criteria for critical research reflects much of what has already been identified, what is novel in their list and of particular importance to this study is the requirement that critical research challenge dominant practice and be practical. The action research component of the study satisfied this criterion.

Validity standards for cooperative inquiry articulated by Heron (1996) indicate that successful cooperative inquiry groups go through a number of cycles, have multiple members, respect individual diversity and develop collective unity (p. 11). According to Heron, “research outcomes are well-grounded if the focus of the inquiry, both its parts and as a whole, is taken through as many cycles as possible by as many group members as possible, with as much individual diversity as possible and collective unity of approach as possible (p. 131)”. This process describes how this study was conducted with both the researcher and participants engaging in repetitive cycles of action research following a standard structure. In addition, Heron suggests that cooperative inquiry groups must be dialogic, and demonstrate parity and reciprocity between members. The design of the study made it possible for these targets to be attained. I worked toward these goals in my role as facilitator of the group.

This study could be described as a teacher study group with a transformative agenda. As a result of her extensive research in this area, Saavedra (1996) identifies eight characteristics of transformative teacher study groups. These groups provide a dialogic context for participating members, in which a democratic environment is created. Individual members further clarify their identity and voice through dialogue within the group. As a group matures, participants develop and demonstrate both ownership and agency by having opportunities to influence group endeavours. To be truly transformative, teacher study groups need to wrestle with issues of dissonance and conflict, as these are steps which precede change. Mediation events and demonstrations provide opportunities for group members to process theory and make connections to practice. Study groups provide opportunities for reflection, action and the generation of

new knowledge consistent with new perspectives, insights and priorities. Finally, effective groups take time for self-assessment and evaluation and other elements of reflective practice. Awareness of these qualities associated with transformative study groups guided my actions with the group and validate the transformative aspects of the leadership development program.

Lincoln and Guba (1985) coined the term trustworthiness in place of validity; their standard includes credibility, dependability, confirmability and transferability (cited in Marshall & Rossman, 2011, p. 41). Carspecken and Apple (1992) suggest that trustworthiness and dialogical data generation, transparency of the researcher's views, and democratic theory production, collaboration and a relational focus are all important in critical research. This study met these criteria through its long term involvement with participants, its heavy emphasis on dialogue, the extensive researcher's positionality section and the collaborative nature of AR. This study satisfies Lather's (1986) standard of trustworthiness due to prolonged engagement, persistent observation, thick description, and the use of a variety of data sources and analytical methods. To satisfy triangulation (Lather, 1986) I focused on findings which were supported through multiple data sources and actively sought out counter examples which challenged the conclusions. Fossey et al. (2002) add that critical research should be congruent in design, responsive to the social context and appropriate and adequate for the research questions. The cyclical nature of action research allowed for the research design to be responsive to participants and changing conditions, as well as be altered in process if it was found to be inadequate in any respect.

Overwhelmingly the response from participants during the validation session was very positive. They felt I had captured the essence of their experience and presented it accurately, “Sounds authentic to me” (Participant R, May 30 Transcript, 2013). Their validation reassured me that my interpretation of our shared experience was as accurate and representative as possible. While I acknowledge that my analysis and interpretation can never be considered neutral, the fact that my findings and description of their experience resonated so strongly was evidence to me that I had satisfied criteria for valid and trustworthy research. Validity standards articulated in this chapter, for social justice research, action research, cooperative inquiry and teacher study groups, were satisfied through this process and trustworthiness was strongly confirmed.

By following the recommendations of respected research methodologists, this study satisfies the criteria for disciplined inquiry. The research design for this study meets the criteria for trustworthy qualitative research and satisfies validity standards for social justice research, action research, cooperative inquiry and transformative teacher study groups. Although the position of the researcher is never neutral in critical research, strategies were put in place to minimize the impact of researcher bias. These strategies included carefully articulating the researcher’s positionality and assumptions, incorporating a variety of data sources, including collaborative opportunities for dialogue, and engaging critical friends. Particular emphasis was placed in this research design on issues of data collection, researcher positionality, action orientation and ethical considerations.

In this research design chapter, I have outlined the methods specific to the study including the data sources, data collection, analysis and interpretation methods, ethical

considerations and validity standards. In the final section of this chapter I summarize Chapter Four.

Summary of Chapter Four

The research study outlined in this chapter was designed within the culture of qualitative participatory action research to explore the design of a leadership development program with potential to develop teacher leaders as internal change agents for social justice in schools. In the tradition of action research, the proposal aimed to “frame the initial problem and anticipate directions the research might take” (Herr & Anderson, 2005, p. 71). The enacted study adhered to various sets of criteria which have been articulated for critical research in both its design and intended implementation. Paramount to critical research is the relationships between the participants and the researcher and this aspect has been given considerable weight in the research design. Of equal importance is the need for critical research to result in action or change.

The choice of action research as the methodology for his study ensured that multiple small actions would be identified through the work of the teacher leaders that could stimulate change in schools. As well, action will result from the study itself which is designed to represent a theory of action (Argyris & Schön, 1974) in a conceptual model for developing teacher leaders as change agents for social justice; this theory of action has the potential to stimulate change in other settings. Critical research places high value on dialogic inquiries (Anderson, 1989; Carspecken & Apple, 1992; Creswell, 2007; Fay, 1987; Fossey et al., 2002; Griffiths, 1998; Lather, 1991; Marshall & Rossman, 2011, Robinson, 1994; Willis, 2007). Dialogue, transformative learning and reflective practice were at the centre of the change strategies identified in this study. The participatory

nature of AR matched well with the intent of the study and the essential qualities of critical research. In the next two chapters I will outline in detail the application of the theoretical framework of the study through the two phases of the study which are: tool development (Chapter Five) and the action research study I conducted during the leadership development sessions to study my facilitation of participants' professional learning (Chapter Six). I begin with the development of the self-assessment tool which was incorporated into the study.

Chapter Five: Developing Iterative Tools for Social Justice Leadership

Chapter Five Overview

In the previous chapter I outlined the research design for this study. Elements of the research design and the preceding chapter on research methodology are reflected in the two chapters which follow. Research elements such as data sources, analysis and ethical considerations are discussed in context to ensure the decision-making processes I followed and the decisions I made throughout the study are clear. Phase one focuses on tool development. This initial phase of the study lasted seven months. It began while I was writing my proposal and continued throughout the ethics approval process and overlapped for three months with the recruitment process. Its most intense phase was the final two months when I carried out three focus groups and pilot testing to establish face validity for the tool.

My primary purpose in phase one was to develop an instrument that would delineate the knowledge, skills and dispositions teacher leaders require to lead for social justice and foster self-reflection and dialogue. This instrument would be called the Social Justice Teacher Leader Self-Assessment (SJTLSA). My secondary objective was to determine how iterative processes help to develop and refine the instrument. It was important for me that the approaches used to develop the tool be consistent with the theoretical framework of the study comprised of critical constructivism, adult learning theory and reflective practice. This framework suggests that the process of tool development be dynamic, collaborative and dialogic with multiple cycles of inquiry. The five sequential steps followed in developing and refining the self-assessment tool are

named in Figure 9: examine precedents, develop a prototype, establish face validity, pilot test and make final decisions.

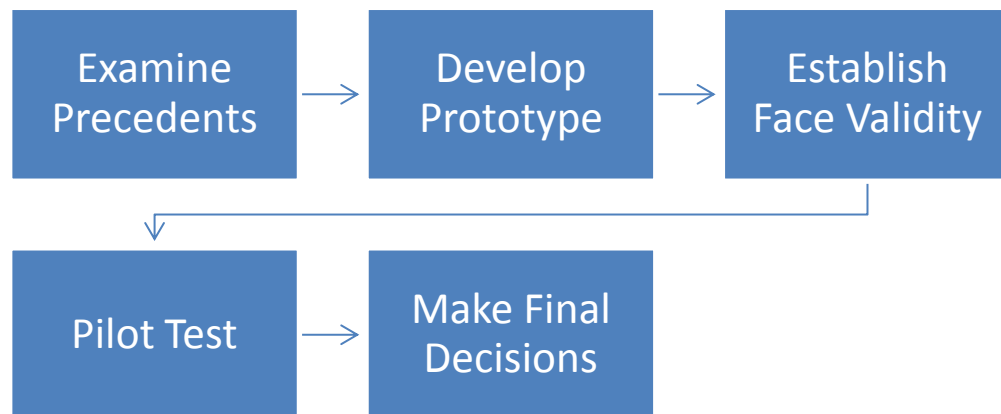


Figure 9. Tool development process.

Examining Precedents

No pre-existing tool in its entirety was appropriate for immediate application to the context of this study although several tools contained aspects of merit. Five different instruments were reviewed in preparation for developing the new tool. Lambert's (1998, 2003) work on shared leadership capacity included three different tools relevant to my purposes. My own students had responded very positively when I used these tools in courses I taught on teacher leadership and I observed that the tools prompted a lot of serious and thoughtful reflection. Katzenmeyer and Moller (2009) developed two different tools on teacher leadership that were also useful. Their tools were self-assessment questionnaires with a focus on the skills and dispositions of teacher leaders and leadership in different school contexts. Crowther et al. (2009) developed a checklist of guidelines for teacher leaders focused on creating school-wide change related to social justice. Finally, Swanson, Elliott and Harmon (2009) created a tool which divided statements into knowledge, skills and dispositions and also included space for goal

setting. Figure 10 synthesizes how each of the precedents consulted informed my thinking.

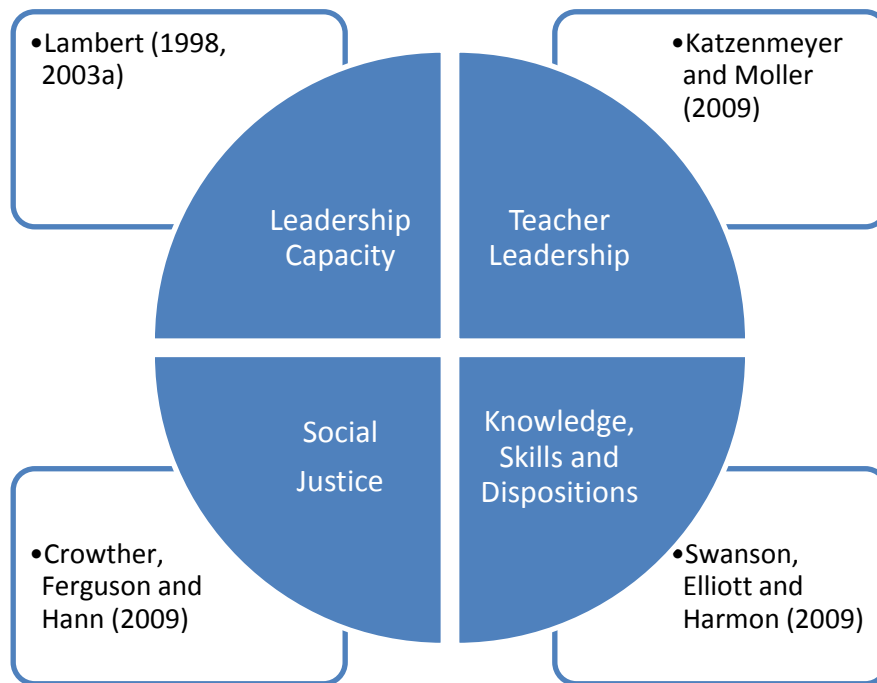


Figure 10. Teacher leadership and self-assessment tools informing the development of the SJTLSA.

These tools presented a variety of formats including checklists, rubrics and questionnaires. Scoring options included Likert scales, self-scoring rubrics and graphs on which to plot results. The questionnaires available suggested some possible section headings and content and even some particular items that might be useful for my research. The tools served a variety of purposes including reflection on beliefs, experience and readiness, dialogue, and social justice. Once I identified and analyzed the existing tools that were useful, I began work on developing a prototype.

Developing the Prototype

I followed Peterson's (2000) six step linear process in developing the prototype: deciding on intent, determining content, identifying topics, proposing items, creating multiple drafts and finally creating a prototype (Figure 11). The first step was to determine the intent of the tool.

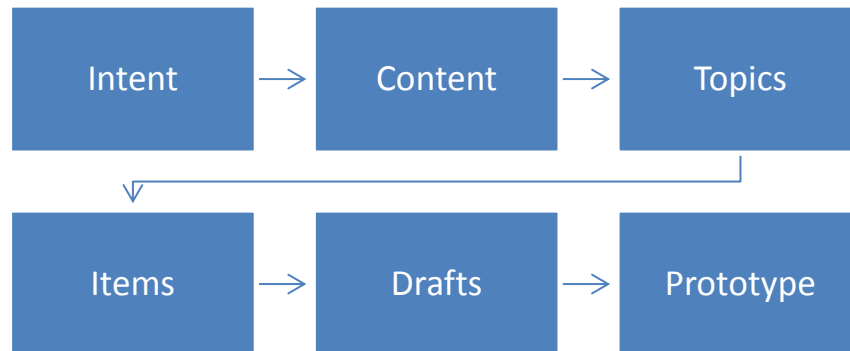


Figure 11. Prototype development process.

Intent. I articulated six different intentions for the prototype. It was intended to gather baseline data at the outset of the study concerning where participants were in their thinking and understanding about teacher leadership that could be used for comparison later in the study. It was also to be used to strengthen self-awareness through the process of reflecting on experience, beliefs and dispositions. As well, I wanted the tool to introduce new concepts from the literature on teacher leadership, the change process, leadership and social justice leadership in particular. Further, I hoped it would serve to frame conversations. I also wanted the tool to help participants reflect on their current school context to clarify the context in which they would be trying to create change. Finally I envisioned a tool which would help people work towards identifying a focus for their own leadership. Once the intent was clarified I began to focus on the actual content of the instrument.

Content. Content for items in the tool came from three sources: the literature review I had done in preparation for the study, the existing tools consulted in the first step of the process and the conceptual model I developed for the study. The process of determining content for the tool began with identifying potential topics to be included.

Topics. As I listed key ideas and concepts from the three sources mentioned above I began to cluster similar ideas together and assign a topic name for each cluster. Figure 12 shows a sample cluster for the topic of “Knowledge” in which I listed related types of knowledge considered important for teacher leaders working for social justice. As I worked through the ideas in each cluster I began to formulate descriptions which helped me further refine the contents and move towards identifying suitable section titles. Once the topics were clearly articulated it was time to begin creating specific items for the tool.

Knowledge	<ol style="list-style-type: none"> 1. Adult Development 2. Collaboration 3. Organizational Change 4. Personal Change 5. Critical Constructs 6. Leadership Paradigms
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Figure 12. Concept cluster for the topic of knowledge.

Items. I began the process of creating items by selecting appropriate items from the existing tools (with permission received from their publishers) and then generated my own statements for concepts not included in the existing tools. In the first draft, 50% of the items came verbatim from the existing tools. At this point I also began exploring types of rating scales and started to include an open response section for the tool to help participants identify a leadership focus for their action research. Figure 13 shows a

sample of some items included in the Personal Attributes section at this stage in the process. The next step in the process was to assemble items into a rough draft of the tool.

Personal Attributes
<ol style="list-style-type: none">1. I am clear about what I believe about teaching, learning and leadership.2. I act in ways that are congruent with my values and philosophy when dealing with students and colleagues.3. I lead others in accomplishing tasks.4. I involve colleagues when planning for change.

Figure 13. Sample of original items in personal attributes section.

Drafts. As I moved into creating drafts of the prototype, I explored a variety of intensity and frequency scales and was encouraged to settle on one which would be applicable throughout all sections of the tool. I explored a variety of scales such as frequency, competency and intensity and settled on an intensity rating scale using the descriptors Strongly Disagree, Disagree, Unsure, Agree and Strongly Agree. I matched each response with a number value beginning with one for Strongly Disagree and progressing up to five for Strongly Agree. I selected this scale as it would generate a numerical score which could be used to calculate a total for each section that when graphed, would make relative comparisons among sections feasible. I also began to refine the items to ensure that each item focused on only one concept so that selecting a response would be easier and more accurate. I also further reworded the purpose to be more specific. Figure 14 shows the visual appearance of a draft. After working through multiple drafts I was ready to make the prototype.

Knowledge	SD	D	U	A	SA
	1	2	3	4	5
1. I understand the potential and purpose of self-reflection as a means of improving practice.	1	2	3	4	5
2. I understand the importance of effective dialogue on teaching and learning among members of the school community.	1	2	3	4	5
3. I work with others to construct knowledge through multiple forms of inquiry.	1	2	3	4	5
4. I understand open-mindedness, flexibility and multiple perspectives are a way to challenge old assumptions.	1	2	3	4	5

Figure 14. Knowledge items in draft of self-assessment tool.

Prototype. When I developed the prototype, the look of the tool had settled into a table format that included a consistent scale, equal numbers of items in each section, and acknowledgement of copyright clearance for use of the tools consulted. Finally I developed a tool for peer reflection based on the same items, just phrased differently, and submitted both prototypes with my ethics application for approval. Figure 15 shows a sample page of the prototype submitted for approval. Once I received ethics approval I began the third phase, establishing face validity for the tool.

Social Justice Teacher Leadership Self-Assessment

Your responses should indicate the degree to which each statement describes your professional practice.

Scale: SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree

#	Personal Attributes	SD	D	U	A	SA
1	I have clear beliefs about teaching and learning.	1	2	3	4	5
2	My beliefs about leadership are clear.	1	2	3	4	5
3	I act in ways that are congruent with my values and philosophy when dealing with colleagues.	1	2	3	4	5
4	I lead others in accomplishing tasks.	1	2	3	4	5
5	I involve colleagues when planning for change.	1	2	3	4	5
6	I seek the perspective of others.	1	2	3	4	5

(Figure continues)

(Figure continued)

7	I can reflect other's thoughts and feelings with accuracy.	1	2	3	4	5
8	I understand that variations in individual background may lead to different points of view.	1	2	3	4	5
9	I make special efforts to understand the beliefs and values of others.	1	2	3	4	5
10	I act with integrity and fairness when working with colleagues.	1	2	3	4	5
11	I am proactive in identifying problems and working to solve them.	1	2	3	4	5
12	I work side-by-side with others to make improvements in the school.	1	2	3	4	5
13	I show initiative and follow through to get desired results.	1	2	3	4	5
14	I maintain balance between my professional and personal life.	1	2	3	4	5
#	Knowledge	SD	D	U	A	SA
15	I understand the purpose of self-reflection as a means of improving practice.	1	2	3	4	5
16	I understand the importance of dialogue on teaching and learning is important among members of the school community.	1	2	3	4	5
17	I work with others to construct knowledge through multiple forms of inquiry.	1	2	3	4	5
18	I understand that qualities such as open-mindedness, flexibility and multiple perspectives can challenge old assumptions.	1	2	3	4	5

Figure 15. Sample page of prototype submitted for ethics approval.

Establishing Face Validity

To establish face validity, I consulted three homogeneous focus groups. As Marshall and Rossman (2011) recommend, I aimed to have between seven and ten participants in each focus group. In preparation for each focus group I prepared the interview protocol and provided participants with a preview of the materials and a copy of the letter of consent they would be asked to sign. Each session was videotaped and then I did theme and content analysis of each videotape.

Focus group one (teacher leaders). The first focus group included eight participants, about 50% of the number I initially approached to participate. The group included a diversity of teacher leaders varying in their grade level and subject area, school division, leadership role and whether or not they were engaged in graduate studies. When asked to describe how they came to be involved in social justice work, members of the teacher leader focus group attributed their involvement to both personal and teaching experiences. Focus group one spoke strongly about the need for teacher leaders to be good listeners with a positive outlook. They also felt it was important that teacher leaders be skilled in facilitation techniques and have a clear vision of equity.

As a result of suggestions made by the first focus group I added a definition of teacher leadership at the beginning of the tool. Until I provided this clarification orally, many participating focus group members did not consider themselves to be teacher leaders. Many were unfamiliar with the phrase teacher leadership and others assumed it described only those who had formal leadership titles and positions. Ten new items were suggested for inclusion in the tool by this focus group and fifteen existing items were rephrased by the group to increase clarity. With reference to format, they suggested I repeat a statement of intent throughout the tool in case people forgot its purpose as they progressed through the tool. Additional suggestions I incorporated were to bold the section titles to make transitions between sections clearer and to use consecutive numbering throughout the tool rather than having multiple items with the same item number.

Focus group two (school leaders). The second focus group was comprised of school leaders. Once again it was a somewhat diverse group although smaller with only

five participants, 20% of the number I approached to participate. In this second focus group there were principals with experience in urban, rural and northern, elementary, middle and senior years' schools and one retired principal. When asked to describe attributes of effective teacher leaders they had worked with they described people who were passionate about what they did and reflective about their practice. They believed those teacher leaders were perceived as wise and trustworthy risk-takers by their peers. School leaders in the second focus group perceived the tool as a form of a visionary statement which could provide them with guidance, that is, something to aspire towards. They thought it would also be valuable to have teachers and administrators complete the school context section and discuss their different perceptions of the school environment.

Feedback from the school leaders helped me clarify some of the dispositions of effective teacher leaders and reword seven items. Many helpful suggestions were made about the wording of items within sections so that they would be more consistent in structure and wording. They also reiterated the value of having a consistent number of items in each section, something which had got lost following the revisions and additions suggested by the first focus group.

Focus group three (social justice advocates). The third focus group was the largest and most challenging group but also was extremely helpful. There were thirteen participants in the third focus group, 30% of the number I had approached to participate. The group was varied and included representatives of various non-governmental organizations engaged in social justice education work within the province. It also included a number of personal contacts whose work or research is closely associated with social justice. This group shared varied and moving personal stories about how they had

come to be involved in social justice work. Their motivations had been both personal and professional in origin. Thoughtful questions posed by this group included: Did I want to ask for evidence to support people's responses? Did I want them to rate the importance of each statement as well as the intensity of their agreement? Would the unsure ratings be useful on the peer reflection tool if many of them were returned with unsure responses? Finally would it be possible to use the tool as a frame for a personal performance appraisal? These big picture questions were helpful as the first two focus groups took more of a detailed view in strengthening individual items in the tool.

As a result of feedback from the third focus group I moved the descriptions of intent for each section to the second page of the document where they could serve as an advance organizer for respondents. At their suggestion I included two blank rows at the bottom of each section so the tool could stay emergent and provide space to capture new ideas people feel are relevant to being a teacher leader for social justice. They also suggested that I number the open response action research section using a different numbering system than the rest of the tool so it could be used separately. Like the first focus group they recommended bolder headings for each section and closer physical proximity for the section descriptions to ensure they would be noticed. Most importantly they recommended that I strengthen the vertical and horizontal sequencing of items and that I reduce the vertical and horizontal redundancy. They were very concerned that people would get fatigued if the sequence was not logical or if there were too many items.

To respond to these last two concerns I did a major overhaul of all the items in the tool. Figure 16 shows the individual items that I first colour coded, then cut into strips

and rearranged. The section shown in Figure 16 remained consistent and only the sequence of items was altered. Figure 17 shows a mixture of different colours requiring renaming of sections. This process resulted in a number of different versions of the tool to accommodate the changes. Figure 18 summarizes the changes that were made to versions 4, 5 and 6 of the tool. By version 6 the resorting and re-categorizing of all the items was much more satisfactory. Three sections were revised and three were retained. I had reduced vertical redundancy by reducing from 17 to 15 items and greatly improved the sequencing of both items and sections. The new order moved from internal to external concepts and from an individual to collective orientation. As a result the flow was more logical and it would be easier to complete. When the revisions were complete, version 8 of the tool was ready for pilot testing.

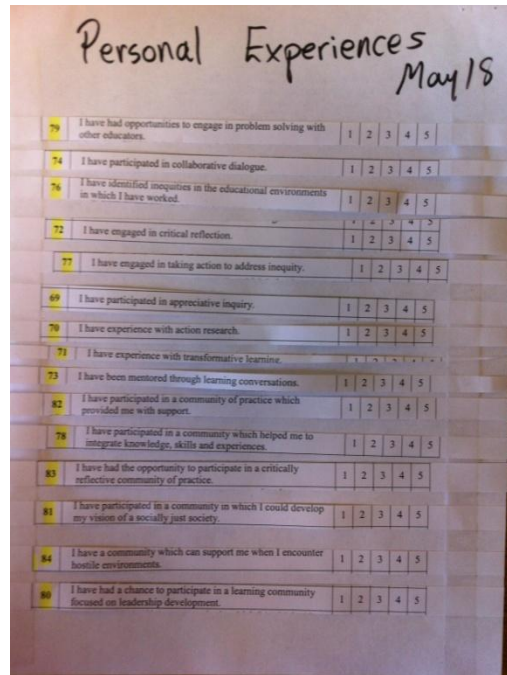
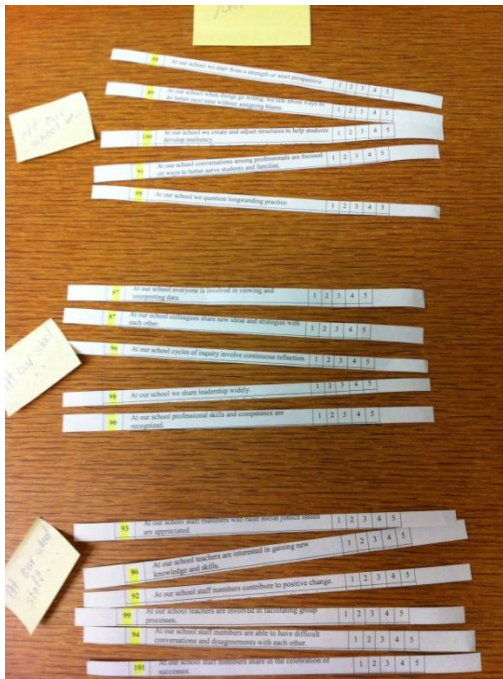


Figure 16. Resorting items from SJTLISA, section content retained as indicated by similar highlighting.

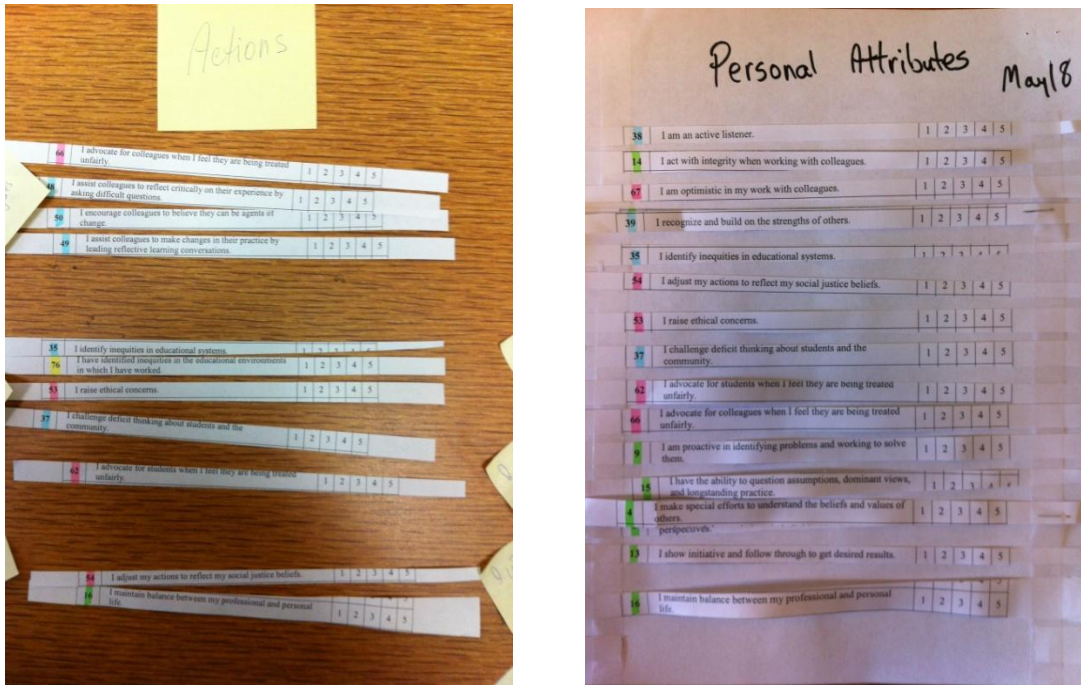


Figure 17. Resorting items from SJTLSA, mixed colours indicate newly created sections.

Version 4	Respond to suggestions from Focus Groups 2 and 3
Version 5	Re-order within sections Introduce blank lines Reduce vertical redundancy (17 to 16 items per section)
Version 6	Resort and re-categorize all items 3 sections revised, 3 sections retained Reduce vertical redundancy (16 to 15 items per section) Horizontal re-sequencing (internal to external, individual to collective)

Figure 18. Revisions to SJTLSA as a result of focus group 3.

Pilot Testing

The purpose of the pilot testing of the SJTLSA was to identify any problems in the administration of the tool including procedures and instructions. I conducted two pilot tests with a total of eight volunteer testers. Five of the eight had seen earlier versions of the tool as part of a focus group and three individuals had not seen the tool before. I collected both written and oral feedback. Those who had seen earlier versions of the tool

commented that the flow and sequence of the tool had been greatly improved through the revision process.

Feedback from the pilot testers resulted in the insertion of a description of the task on the first page of the tool. Testers also suggested that I include a blank space at the end of the six sections in which people could record their thoughts and any goals they might have generated while completing the tool. They encouraged me to make more explicit mention of the blank lines and their purpose and the option of using post-it notes to record personal reminders for particular items, when delivering my instructions. Finally they suggested that I include an option to debrief orally with a partner after completing the items since they had found the experience of completing the final section of the tool on school culture to be quite emotional. As a result of the changes suggested by the pilot testers I generated version 9 of both the SJTLSA and the SJTLPR. Completing version 9 brought the first four phases of the process to a close and prepared me for the final decision-making phase.

Making Final Decisions

After three focus groups and two pilot tests I was very curious to compare the original items included in step two with those in the finished tool. I was surprised to discover that not one of the items which had been taken directly from the tools consulted remained the same in version 9. When I compared the revised tool with the tools consulted initially there were few similarities, just the use of a Likert scale and a scoring page. There were multiple differences. The section headings, content and sequence were different. The scoring scale adopted, categories of the scale and values were different. Finally the use of additional space for emergent items and space for written goals or

reflections was unique. My conclusion was that the SJTLSA had been *inspired by* not *adapted from* the previous tools consulted.

The final SJTLSA tool resulting from this process is presented in Figure 19 (pages 181-190). It has seventy-five Likert style items divided into six sections of fifteen questions. It is prefaced by a definition of teacher leadership; contains clear statements of purpose, task and intent, and advance organizer descriptions of each of the six sections. Following the six sections there is a self-scoring page including space for recording scores, a graph to compare section totals and a space to record new goals and reflections. The final section of the tool is a one page open response section designed to help teacher leaders identify a focus for their leadership and action research.

**SOCIAL JUSTICE TEACHER LEADERSHIP SELF-ASSESSMENT
(SJTLSA V. 9)**

Teacher leaders, through both formal and informal roles, voice ethical concerns and facilitate dialogue within diverse learning communities, influence others towards improved practice and strengthen educational outcomes for all learners.

The Social Justice Teacher Leadership Self-Assessment (SJTLSA) is designed to

- Assist teachers to reflect critically on the dispositions, knowledge, and skills they possess as teacher leaders committed to social justice in their particular school context; and
- Identify a focus for action research related to their area of leadership.

The Social Justice Teacher Leadership Self-Assessment (SJTLSA) is intended to:

- Introduce the key concepts and principles found in the literature on social justice, leadership development and teacher leadership, which have informed the study;
- Stimulate personal reflection and awareness, and identify links between personal leadership positions, roles and responsibilities, and social justice;
- Facilitate reflection and awareness about your school's approach to leadership and social justice;
- Establish a baseline from which to identify individual and collective shifts in attitudes, behaviours and skills;
- Assist with goal setting and establishing a focus for action research;
- Generate responses which can be used to stimulate dialogue and sharing within the cohort.

SOCIAL JUSTICE TEACHER LEADERSHIP SELF-ASSESSMENT (SJTLSA V. 9)*

SJTLSA statements cover the following dimensions of social justice leadership:

Dispositions:

- Teachers demonstrate personal commitment to social justice, equity, diversity and inclusion, and approach their work with optimism and a sense of agency.

Knowledge:

- Teachers have content knowledge pertinent to social justice teacher leadership.

Personal Attributes:

- Teachers are aware of personal leadership qualities which make them effective teacher leaders.

Personal Experiences:

- Teachers have experienced learning through processes associated with social justice teacher leadership.

Leadership Skills:

- Teachers possess skills to facilitate adult learning and help others think critically about equity issues.

School Culture:

- Teachers work in school environments with broad participation in leadership, and positive supportive cultures which focus on ongoing growth and improvement.

Circle the response which indicates the degree to which each statement describes your professional practice in your current context.

*The Social Justice Teacher Leadership Self-Assessment has been inspired by: Rubric of Emerging Teacher Leadership, Leadership Capacity Staff Survey and Leadership Capacity School Survey (Lambert, 2003); Self-Survey of Preliminary Leadership Perceptions (Crowther, Ferguson & Hann, 2009); and Teacher Leadership School Survey (TLSS) and Teacher Leadership Self-Assessment (TLSA) (Katzenmeyer & Katzenmeyer, in Katzenmeyer & Moller, 2009).

DISPOSITIONS

Statements in this section are designed to stimulate self-reflection and dialogue about personal commitments to social justice that lead to optimism and a sense of agency.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree	SD	D	U	A	SA
1	I have clear beliefs about teaching and learning.	1	2	3	4	5
2	I have clear beliefs about leadership.	1	2	3	4	5
3	I view all community members as having strengths.	1	2	3	4	5
4	I have affinity for individuals who are marginalized.	1	2	3	4	5
5	My beliefs about social justice stem from personal experience.	1	2	3	4	5
6	I believe that inequities in society influence what happens in schools.	1	2	3	4	5
7	I believe all children have the right to attend neighbourhood schools.	1	2	3	4	5
8	I am committed to appropriately challenging all students.	1	2	3	4	5
9	I hold high expectations for all students.	1	2	3	4	5
10	I believe when students are unsuccessful, schools need to examine their practices.	1	2	3	4	5
11	I believe in creating and preserving options for students.	1	2	3	4	5
12	I believe teachers are capable of improving student success through deliberate thoughtful action.	1	2	3	4	5
13	I believe sustainable and continuous improvement is possible.	1	2	3	4	5
14	I believe teachers share responsibility for the success of their colleagues.	1	2	3	4	5
15	I believe all staff members can be school level leaders.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

KNOWLEDGE

Statements in this section are designed to stimulate self-reflection and dialogue about content knowledge considered pertinent to social justice teacher leadership.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree	SD	D	U	A	SA
16	I understand the value of working with others to seek solutions.	1	2	3	4	5
17	I know how to work with others to construct knowledge through multiple forms of inquiry.	1	2	3	4	5
18	I understand the importance of dialogue about teaching and learning among members of the school community.	1	2	3	4	5
19	I understand that variations in individual background may lead to different points of view.	1	2	3	4	5
20	I understand qualities such as open-mindedness and flexibility can challenge old assumptions.	1	2	3	4	5
21	I understand and recognize the importance of cultural competency.	1	2	3	4	5
22	I understand and recognize the importance of hiring teachers from diverse cultures and experience.	1	2	3	4	5
23	I understand the difference between equality and equity.	1	2	3	4	5
24	I understand the relevance of critical theory to teaching.	1	2	3	4	5
25	I understand it is necessary to critically examine content knowledge.	1	2	3	4	5
26	I understand the purpose of self-reflection as a means of improving practice.	1	2	3	4	5
27	I understand disequilibrium is necessary before transformative learning can occur.	1	2	3	4	5
28	I understand some variables that influence teachers to transform evidence based knowledge into action.	1	2	3	4	5
29	I understand that people need to feel safe in order to take risks.	1	2	3	4	5
30	I understand how to mediate conflict within the school.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

PERSONAL ATTRIBUTES

Statements in this section are designed to stimulate self-reflection and dialogue about personal qualities which contribute to effective social justice teacher leadership.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree	SD	D	U	A	SA
31	I am an active listener.	1	2	3	4	5
32	I act with integrity when working with colleagues.	1	2	3	4	5
33	I am optimistic in my work with colleagues.	1	2	3	4	5
34	I recognize and build on the strengths of others.	1	2	3	4	5
35	I identify inequities in educational systems.	1	2	3	4	5
36	I adjust my actions to reflect my social justice beliefs.	1	2	3	4	5
37	I raise ethical concerns.	1	2	3	4	5
38	I challenge deficit thinking about students and the community.	1	2	3	4	5
39	I advocate for students when I feel they are being treated unfairly.	1	2	3	4	5
40	I advocate for colleagues when I feel they are being treated unfairly.	1	2	3	4	5
41	I am proactive in identifying problems and working to solve them.	1	2	3	4	5
42	I have the ability to question assumptions, dominant views, and longstanding practice.	1	2	3	4	5
43	I am open-minded and flexible in considering multiple perspectives.	1	2	3	4	5
44	I show initiative and follow through to get desired results.	1	2	3	4	5
45	I maintain balance between my professional and personal life.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

PERSONAL EXPERIENCES

Statements in this section are designed to stimulate self-reflection and foster dialogue about personal experiences that are associated with social justice teacher leadership.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree	SD	D	U	A	SA
46	I have had opportunities to engage in problem solving with other educators.	1	2	3	4	5
47	I have participated in collaborative dialogue.	1	2	3	4	5
48	I have identified inequities in the educational environments in which I have worked.	1	2	3	4	5
49	I have engaged in critical reflection.	1	2	3	4	5
50	I have engaged in taking action to address inequity.	1	2	3	4	5
51	I have participated in appreciative inquiry.	1	2	3	4	5
52	I have experience with action research.	1	2	3	4	5
53	I have experience with transformative learning.	1	2	3	4	5
54	I have been mentored through learning conversations.	1	2	3	4	5
55	I have had opportunity to participate in a community which provided me with support.	1	2	3	4	5
56	I have participated in a community which helped me to integrate knowledge, skills and experiences.	1	2	3	4	5
57	I have participated in a critically reflective community of practice.	1	2	3	4	5
58	I have participated in a community in which I could develop my vision of a socially just society.	1	2	3	4	5
59	I have a community which can support me when I encounter hostile environments.	1	2	3	4	5
60	I have participated in a learning community focused on leadership development.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

LEADERSHIP SKILLS

Statements in this section are designed to stimulate self-reflection and dialogue about the skills required to facilitate adult learning and critical thinking about equity issues.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree SA = Strongly Agree	SD	D	U	A	SA
61	I understand the importance of identifying and acknowledging problems.	1	2	3	4	5
62	I work side-by-side with others to make improvements in the school.	1	2	3	4	5
63	I engage others in accomplishing tasks.	1	2	3	4	5
64	I facilitate dialogue with groups.	1	2	3	4	5
65	I can paraphrase others' thoughts and feelings with accuracy.	1	2	3	4	5
66	I structure group processes to enhance communication in groups.	1	2	3	4	5
67	I encourage colleagues to share different perspectives.	1	2	3	4	5
68	I facilitate problem-finding and problem-solving conversations with colleagues.	1	2	3	4	5
69	I assist colleagues to make changes in their practice by asking reflective questions.	1	2	3	4	5
70	I help others examine data with an equity lens.	1	2	3	4	5
71	I navigate interpersonal power dynamics within groups.	1	2	3	4	5
72	I manage conflict within a group productively.	1	2	3	4	5
73	I engage others in planning for change.	1	2	3	4	5
74	I encourage colleagues to believe they can be agents of change.	1	2	3	4	5
75	I act in ways that are congruent with my values and philosophy when dealing with colleagues.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

SCHOOL CULTURE

Statements in this section are designed to stimulate self-reflection and dialogue about elements of the school culture in which you work that foster growth and improvement.

#	SD = Strongly Disagree D = Disagree U = Unsure A = Agree	SD	D	U	A	SA
	SA = Strongly Agree					
76	At our school we start from a strength or asset perspective.	1	2	3	4	5
77	At our school when things go wrong, we talk about ways to do better next time without assigning blame.	1	2	3	4	5
78	At our school we create and adjust structures to help students develop resiliency.	1	2	3	4	5
79	At our school conversations among professionals are focused on ways to better serve students and families.	1	2	3	4	5
80	At our school we question longstanding practice.	1	2	3	4	5
81	At our school teachers are interested in sharing new ideas and strategies with each other.	1	2	3	4	5
82	At our school everyone is involved in viewing and interpreting data.	1	2	3	4	5
83	At our school we engage in continuous cycles of inquiry.	1	2	3	4	5
84	At our school we share leadership.	1	2	3	4	5
85	At our school professional skills and competence are recognized.	1	2	3	4	5
86	At our school staff members who raise social justice issues are appreciated.	1	2	3	4	5
87	At our school staff members contribute to positive change.	1	2	3	4	5
88	At our school teachers are involved in facilitating group processes.	1	2	3	4	5
89	At our school staff members are able to have difficult conversations and disagreements with each other.	1	2	3	4	5
90	At our school staff members share in the celebration of successes.	1	2	3	4	5
		1	2	3	4	5
		1	2	3	4	5

SELF-SCORING YOUR SJTLSA RESPONSES

Self-Scoring Procedure

Dispositions <i>Enter totals of items 1-15</i>		Personal Experiences <i>Enter totals of items 46-60</i>	
Knowledge <i>Enter totals of items 16-30</i>		Leadership Skills <i>Enter totals of items 61-75</i>	
Personal Attributes <i>Enter totals of items 31-45</i>		School Culture <i>Enter totals of items 76-90</i>	
		Additional Items <i>Enter totals of additional items</i>	

Social Justice Teacher Leadership Self-Assessment

For each scale start at zero and shade the row until you reach the box with your score.

Scale Name	5	10	15	20	25	30	35	40	45	50	55	60	65	70	75
Dispositions															
Knowledge															
Personal Attributes															
Personal Experiences															
Leadership Skills															
School Culture															
Additional Items															

<p>Personal Reflection and Goals</p>

PERSONAL RELEVANCE AND FOCUS FOR ACTION RESEARCH

The intent of this section is to help you identify a personal focus for your action research in the area of teacher leadership for social justice. You may find reflecting on your responses in the previous section useful in this process. This personal focus will be a critical aspect of your involvement with the Social Justice Teacher Leadership Cohort.

- A. Teacher leaders provide informal or formal leadership in schools and other educational settings. In what ways do you see yourself as a leader for your adult colleagues?
- B. What do you see as the most pressing social justice issue(s) in your school that relate to the area of leadership for which you have taken (or plan to take) responsibility?
- C. What do you think might be a potential social justice focus in your leadership?
- D. How would you describe your current level of performance in the area you have identified in the previous question?
- E. What is your area of greatest concern or tension in your leadership work?
- F. What would you like your leadership to accomplish?

Figure 19. SJTLSA version 9 used with participants during cohort sessions.

Researcher Reflections

The tool development process described here brought with it many surprises. I had not anticipated that the focus groups and pilot test would be such creative processes and that the tool would continue to be emergent throughout the process. This experience can be explained by complexity theory. Sense making was done through dialogue, critical perspectives were introduced from a variety of participants and the tool was strengthened through the valuable input of multiple and diverse community members. The resulting tools are a result of collaborative effort; they are cohesive in content and sequence, and holistic in orientation and scope. The process I followed has both generated and benefited from a collective sense of curiosity amongst Manitoba educators.

Post Script

The emergent nature of the tool continued throughout the study. Further modifications to the tool occurred towards the end of the study as a result of complications arising from the “unsure” rating. The process by which this change occurred will be reported in Chapter Eight in the self-assessment section, when I focus on research question two. I resolved the issue by modifying the numerical values of the scale. The old and new scoring values are shown in Figure 20. By assigning a numerical value of zero to the rating of unsure I reduce its numerical impact on the data. The ranking of unsure had been selected by participants to convey a multitude of meanings. Some used it for “sometimes” and others for “I don’t know”. Since its meaning was inconsistent the best option I had at that point in the process was to revise the numerical values. In future versions of the tool I will remove the centre column option entirely. I

will retain the new values for the responses because participants found them to provide a more accurate reflection of their positive and negative experiences.

	Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
Old	1	2	3	4	5
New	-2	-1	0	1	2

Figure 20. Comparison between old and new scoring values for SJTLSA and SJTLPR.

Summary of Chapter Five

In this chapter I have described the process of developing the SJTLSA and the SJTLPR, two tools to be used for critical reflection during the leadership development sessions. I described the tool development process beginning with examining precedents of other teacher leadership self-assessment tools. Second, I described the process of developing a prototype to begin soliciting feedback. Third, I described the process of establishing face validity through three focus groups. Fourth, I described the pilot testing process used to eliminate procedural difficulties in implementing the tool. Fifth, I described the decision-making process I followed in creating the version of the two tools that would be used throughout the study.

In Chapter Six I describe the action research inquiry I conducted to study my facilitation of the leadership development sessions. Each action research cycle consisted of specific data collection, analysis and interpretation strategies which helped determine appropriate goals, content and processes for facilitating subsequent leadership development sessions. Chapter Six includes a description of each process, the data it generated, analysis of that data and an assessment of its contribution to the research.

Chapter Six: Process-Folio of the Researcher's Action Research Inquiry

Chapter Six Overview

In this chapter I focus on the action research process I followed during the development and implementation of the leadership development sessions. This chapter outlines the central question guiding the inquiry as well as the process followed. My purpose for this action research inquiry was to answer the question: *How do I facilitate Teacher Leadership for Social Justice (TLSJ) cohort sessions to develop the agency of teacher leaders for social justice?* In this chapter I intend to provide an accounting of the ten step process I followed for each session. Articulating each step in my thinking process makes the intangible nature of facilitating such a group tangible for others. I focus on process and outcomes and how I conducted data analysis throughout the study (Herr & Anderson, 2005). I begin by describing the processes I used in studying my own practice. The findings from each data set generated then are presented, followed by an analysis of those findings. Finally, I present post-reflective and evaluative observations on the research benefits of each strategy.

I provide all of this in one chapter, rather than the more traditional approach of separating data from analysis. This detailed accounting of process expands upon the data collection, analysis and interpretation methods outlined in Chapter Four. The chapter provides the reader with necessary insight into the action research process I followed in planning for, monitoring, reflecting upon and learning from each of the leadership development sessions. It also provides the reader with essential background knowledge to understand the findings presented in subsequent chapters that focus on answering the four

research questions. The format I have selected as most appropriate to document and present the process I followed during this action research inquiry is a process-folio.

Process-Folio: Definition, Purpose and Function

Process-folio is a term originating in Project Zero and Arts Propel (Gardner & Perkins, 1988) initiatives and commonly encountered in the arts. A process-folio is a collection of works in progress “designed to capture the steps and phases ... in the course of learning” (Gardner & Torff, 1999, p. 102). A process-folio of a visual artist would include rough sketches, experimentation with form and technique and reflections on the creative process used in developing a finished piece. This focus on detailed data collection, reflective practice and analysis of process make the process-folio an appropriate choice for this action research inquiry. This process-folio makes my thinking and decision-making processes public.

As mentioned in Chapter Four, I organized the leadership development sessions around the design frame (Figure 8) in which I stated the purpose of the sessions, anticipated outcomes for participants, what they could expect during sessions, my intention to facilitate effective learning strategies and processes and the nature of the community I hoped would be created through our shared experience. To study my own facilitation of the leadership development sessions I moved through the ten-step data collection and analysis procedure mentioned in Chapter Four, through which I monitored the six sessions and documented process, content and decision-making. Figure 21 situates the Design Frame at the center of all decisions and indicates the sequence in which each of the ten steps was conducted. A detailed description of each of the ten steps follows, beginning with the Researcher’s Action Research Cycle.

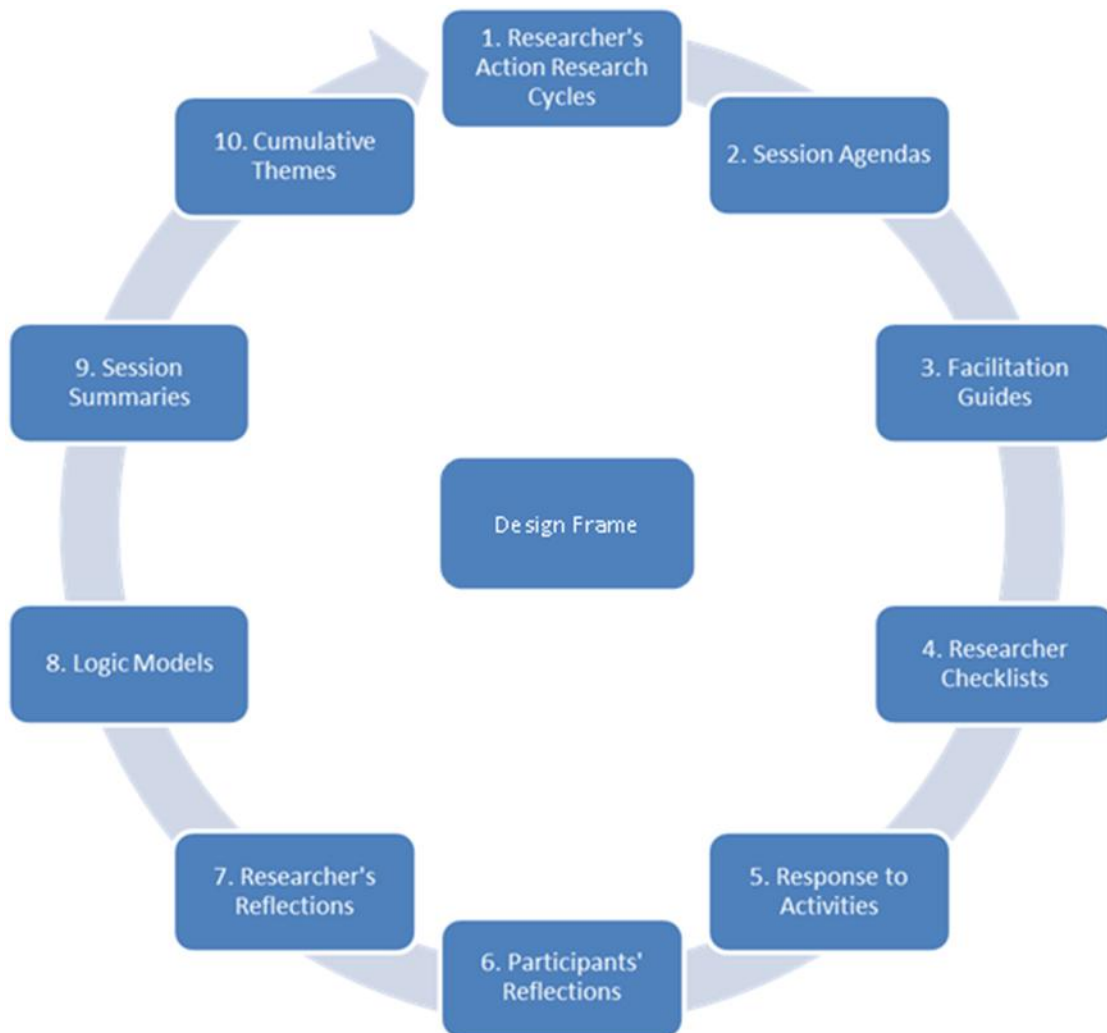


Figure 21. Ten sequential steps for researcher's action research inquiry including data collection, analysis and interpretation.

Step One. Researcher's Action Research Cycles

The format of the action research cycle template I developed, an adaptation of Lewin's (1946) action research structure, is "look, think, act and reflect". The first side of the template presented the cycle in a circle with the four steps "look, think, act, reflect" (Figure 22). The short description inserted under each heading was to support participants and help them understand the action research process.

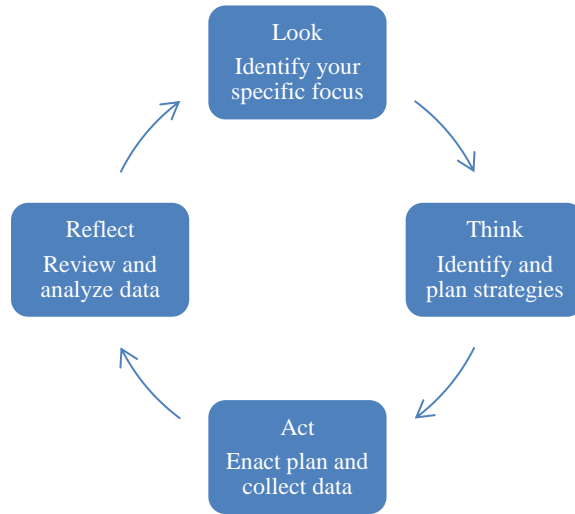


Figure 22. Action research cycle template page 1.

The second side of the template included four components with a focus question in each quadrant and directional arrows to support participants in working their way through the process in a circular fashion (Figure 23). The guiding questions were provided to make the structure less intimidating for participants.

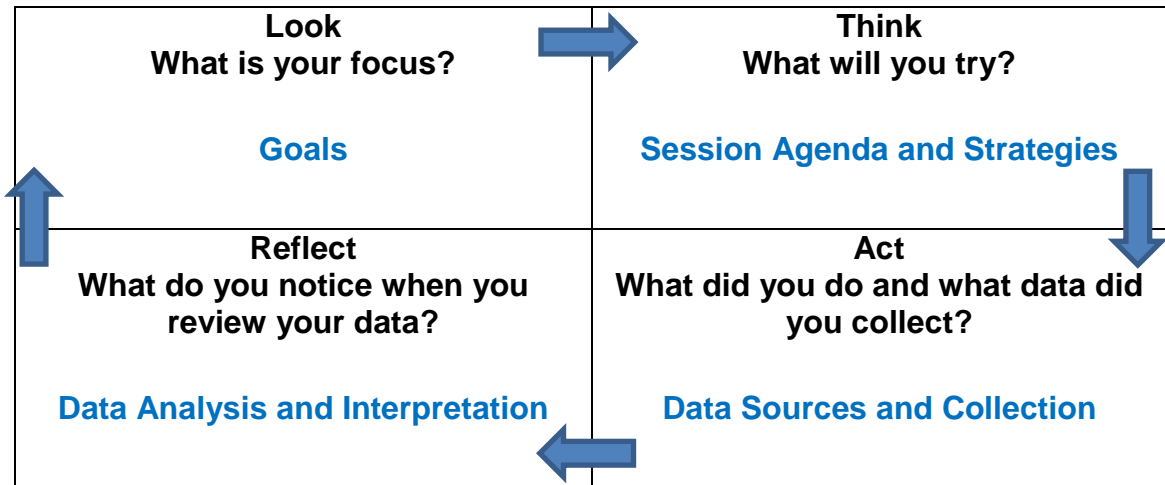


Figure 23. Action research cycle template page 2.

As the researcher, I generated an action research cycle before each cohort session. This assisted me in identifying my intentions and developing a specific agenda for the

session. Before the first session I drafted my research question: “How do I facilitate Teacher Leadership for Social Justice (TLSJ) cohort sessions to develop the agency of teacher leaders for social justice?” and completed three of the four components of the template: look (goals), think (session agenda and strategies), act (data sources and collection), and reflect (data analysis and interpretation). I shared this partially complete “cycle in progress” with participants to make the process of action research clear and to model where I was in the process at the time of the session. I explained to them that I used my research question to set my goals for the first session and those goals helped me select appropriate strategies and create an agenda. I made it clear that I identified my data sources ahead of time so I could take the appropriate steps to collect the data. Following the first session I revised the data sources on my action research cycle to include any unanticipated data collected, adjusted the agenda to reflect what actually happened and did my analysis of each data set. I summarized the results of my analysis, particularly of the Participants’ Reflections and emerging themes, in the reflection section of action research cycle one. I then immediately began creating the second research cycle by setting goals for Session Two, based on the reflections recorded on cycle one. This cyclical process is represented in Figure 24. In each subsequent leadership development session cohort members were given a copy of the completed cycle from the previous session and a “cycle in progress” for the current session.

Using this approach was very effective for me as a researcher. Preparing the action research cycles to share with participants during each leadership development session helped me consolidate the intent, content, process and findings from each session.

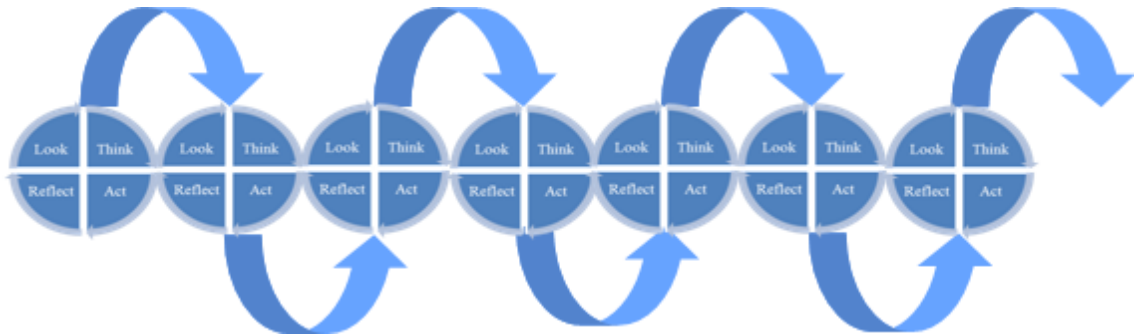


Figure 24. Researcher's action research process (S1 to S6 and validation session).

Setting goals for each leadership development session on the action research cycles was an effective way to ensure that when planning the sessions I was constantly reflecting on the purpose of the learning activities and whether they addressed the intended goals of the session. Goal setting also helped me to prioritize when it became clear there were too many planned activities on the agenda, either at the planning stage or during the sessions themselves. I used the same action research cycle template I was expecting participants to complete during cohort sessions. As a consequence, the exemplars I provided for participants were easily understood and served as reference points for how to follow the process and what type of information should be recorded in each section of the model. Participants commented that living the action research model while doing their own action research was both helpful and powerful. The action research cycles functioned as a model for participants to refer to when doing their own action research. When I shared with participants how I created the cycles and the process I followed in analyzing and working with data, the transparency helped participants understand each step in the process.

To analyze the researcher action research cycles, I created cumulative charts, one for each component of the cycles, on which I placed all data from the six cycles on one chart to facilitate comparison. The charts made it easier to see all data at once and focus

on only one aspect of the action research cycles at a time. I also created a more in-depth chart which identified the data sources used in every session, in addition to those used only in specific sessions. This master chart of data sources was helpful when undertaking analysis for specific research questions and consequently will be included in Chapters Seven to Ten (e.g., Table 24, p. 244). Each action research cycle developed provided a starting point for designing agendas for sessions.

Step Two. Session Agendas: Sessions as Envisioned

For each of the six sessions I prepared an agenda that was provided to participants on site. This was done so participants could anticipate the day and offer input or suggestions as to how it might be restructured to more fully meet their needs. I maintained a consistent format throughout the sessions deliberately to establish the agendas as one of our routines. The letterhead included a photo of irises and a textbox titled “Teacher Leadership for Social Justice Cohort 2012-2013”. Immediately below was the session number, date and location followed by a detailed, timed agenda. Consistent time frames were used for each session. For each quarter of the day, I listed specific activities planned for that segment. Figure 25 presents a sample agenda.

One of the interesting patterns that surfaced when analyzing the agendas was that I made a shift half way through the sessions. For sessions one to three I listed activities by strategy names such as “Most Important Point” or “Two Sides of the Coin” (Lipton & Wellman, 2011a). These names were provided to provoke curiosity and ensure a focus on process. For sessions four to six I listed activities by purpose or function such as “Peer feedback” or “Learning-focused conversations”. I was not conscious of this shift at the time. In retrospect I believe this shift may have occurred for a number of reasons. First, I



**Teacher Leadership for
Social Justice
Cohort
2012-2013**

**Session Four
January 10, 2013
Judy Bradley Square MTS**

- 8:30 Informal Visiting and Snacks**
- 9:00 Synectics
Reflective Journaling
Thematic Analysis Validity Check
Action Research Refinement
Paraphrasing and Partner Dialogue**
- 10:30 Break**
- 10:45 Transformative Leadership and Learning Reading Groups
Jigsaw**
- 12:00 Lunch (catered in)**
- 1:00 Preparing for Fierce Conversations
Movement Break
Johari's Window Self-Assessment and Peer Feedback**
- 2:15 Break**
- 2:30 Participant Reflection
Suggestions for Session Five
Sharing Circle**
- 3:30 Home**

Figure 25. *Sample agenda.*

think I put less of a focus on using specific strategies as time went on and I was more comfortable with the group. As I spent more time between sessions on analysis and the preparation of themes I likely spent less time on planning specific strategies to use. Second, I was asked by one participant to be more explicit about the purpose of activities so I may have felt listing them by function was more transparent. Third, I think that over time the routines that were important for the cohort became more explicit. Cohort members were very aware of which elements of the sessions people were finding valuable as a result of reviewing the theme statements I shared with them. By naming the activities according to the elements they were finding valuable, I was showing attentiveness to their feedback and allocating time for those activities they valued most. Fourth, as there were a number of routines participants were finding valuable, there was also less time available for introducing new strategies.

The agendas helped provide an organizational frame for each session. Over time we came to see them as tentative rather than firm agendas. During the first few sessions I began to consult participants about possible changes in the planned agenda as the day progressed. It wasn't until the second half of the sessions that I became comfortable dropping activities off the agenda. Participants taught me to do this with comments such as "ambitious agenda" or "felt rushed" appearing on their Participant Feedback sheets.

The agendas represent the sessions as I anticipated them. The logic models, which were created afterwards, captured the sessions as they actually occurred. By comparing the agendas and the logic models I note that I was often overly optimistic in my time frames, particularly in Session Four. As the sessions progressed I planned fewer activities per time block and allocated more time for small group work. Participants often

commented on how much they valued the careful design and planning that went into the sessions so I believe the agendas were appreciated and effective in providing structure.

The agendas supported adult learning as long as they were perceived as a guide rather than a rigid frame, and changes to the planned agenda were discussed and negotiated with the group.

Step Three. Facilitation Guides: Sessions as Scripted

In preparation for each session I created a facilitation guide to support the agenda. Whereas the agenda listed activities by title and provided a suggested sequence of activities, the facilitation guide provided specific instructions (and phrasing) prepared for introducing and conducting the learning activities. Learning activities were listed in the order of the planned agenda but not all activities were included. Entries per specific learning experience included the title, source and purpose of the experience along with itemized instructions to guide the facilitation.

Table 7 summarizes the contents of the six facilitation guides and makes some patterns observable. As the sessions progressed, the number of entries per session increased overall, from five to 13. The number of specific strategies described also generally decreased with a high of six in Session Two to a low of two in Session Six. The number of routines described increased steadily from 0 in Session One to 11 in Session Six. This progression seems logical for a number of reasons. As more of the activities were developed around our own content and processes, there was more of a need to prepare for the facilitation to ensure I was clear on how to direct participants. Also, as more routines were incorporated into the sessions, they needed to be revised and fine-tuned to accomplish specific objectives and facilitate growth. The routines described

most often in the facilitation guides, such as journaling (4) and participant reflections (3) are those which provided scope for learning and variation over time, and which therefore, required careful preparation to be effective.

Table 7

Content Summary of Facilitation Guides

Session	Entries	Strategies	Routines	Structure	Specific Routines Described
1	5	5	0	Purpose Instructions	
2	7	6	1	Purpose Instructions	Journals
3	5	4	1	Purpose Script Scripted Debrief	Participant Reflections
4	5	3	2	Script	Journal, Action Research Learning-focused Conversations
5	10	4	6	Detailed Script	Journal, Action Research, Theme Feedback, Participant Reflections, Looking Ahead, Sharing Circle
6	13	2	11	Detailed Script Data Collection Strategies	Opener, Journal, Learning- focused Conversations, Movement Break, Planning Ahead, Participant Reflections, Sharing Circle, Action Research Model, Other Facilitators (3)
Structure		Script (4) Purpose (3) Instructions (2) Detailed Script (2) Scripted Debrief (1)			
Specific Routines Described		Reflective Journals (4) Participant Reflections (3) Action Research (2); Learning-focused Conversations (2) Planning Ahead (2); Sharing Circle (2) Theme Feedback (1); Opener (1)			

When I examine the structure of the descriptions in each session's guide I notice a gradual shift away from instructions (2) directed at me: "Reveal one prompt at a time. Participants work in silence" (Session One Facilitation Guide, p. 1), to a detailed script (4) with words prepared to explain a specific learning experience to participants: "Today

we are going to work on strengthening each other`s action research cycles... Your job is to lead a conversation with your partner” (Session Four Facilitation Guide, p. 1). I think this shift happened because I used outside sources in the earlier sessions and those instructions are traditionally written in the third person. In addition, the movement away from specific strategies and more into using routines to focus our work required me to elaborate in greater detail. As I thought out the process for how I planned to vary each routine, I wrote a detailed script to guide me.

I also realized that preparing an actual script supported me to be a more effective facilitator. In Session Five in particular, I was very glad to have the guide and the wording prepared. I had asked members to write in their journals about their action research but did not give them specific instructions. When they asked for more direction I turned to the more specific set of instructions I had prepared for the facilitation guide:

Take some time to write down everything that has happened in the area of your action research since we last met in January. Be sure to note the strategies you have used, the data you have collected and the sense you have made of your data. If you have not completed all of the steps figure out where you are in the process. Summarize your last month`s work in four sentences, one per section of the action research model. For example... (Session Five Facilitation Guide, p. 1)

Once given a clear direction and focus for their reflective writing, the group completed the task efficiently and with a high level of focus.

The facilitation guide helped me think through the session and how I anticipated activities being carried out. I noted changes in my thinking when I compared the agendas,

facilitation guides and logic models. The most common sequence I followed was to develop the agenda and from that plan create the facilitation guide. The facilitation guide captured my thinking at the point in time when I wrote it. Since my thinking continued to evolve, titles of activities, their order and focus shifted slightly between the different records of the sessions. The agenda can be thought of as “session as envisioned”, the facilitation guide as “session as scripted” and the logic model “session as experienced”. The researcher’s checklists also evolved over the course of the six sessions.

Step Four. The Researcher’s Checklists

In preparation for each session I created a researcher’s checklist to prompt me regarding logistical aspects of conducting each session. Once again all of the session checklists followed a similar format. I used the researcher’s checklist to remind me of key activities during the day. I also recorded notes on each copy and used it as a checklist to monitor my progress through the many tasks associated with each session.

The headings and topics I chose for planning purposes are displayed in Table 8. Examining the table it is clear to see how the checklists evolved over time to become more specific. The portions of the checklists which expanded over time were the tasks to be completed after each session. This area of growth is not surprising given that the analysis process became more sophisticated and systematic over time. Specific tasks were often entered on the checklist formally after they were found to be necessary and useful in a previous session.

The researcher’s checklist was a place to record reminders so that I could glance at the list during a session and be reminded of tasks I may have overlooked or had issues with during previous sessions. I found creating the checklist to be a useful task as it

forced me to think through the specific issues I needed to address for the upcoming session and pointed to logistical challenges to be solved. As mentioned, I checked off each item on the researcher`s checklists as they were completed (or when I got a chance) and jotted down additional points to be included in subsequent checklists.

Table 8

Researcher`s Checklist Summary

Timing	Task types	Session					
		1	2	3	4	5	6
One week before the session	Confirm space	X	X	X	X	X	X
	Email participants re date and materials		X	X	X	X	X
	Order food	X	X	X	X	X	X
	Prepare and copy materials	X	X	X	X	X	X
Days before the session	Check and pack equipment	X	X	X	X	X	X
	Delete previous video files on cameras			X	X	X	X
	Confirm logistics including catering bill	X	X	X	X	X	X
Morning of the session	Set-up list: equipment, food and visuals	X	X	X	X	X	X
	Reminders about recording equipment	X	X	X	X	X	X
	Travel reimbursement forms	X	X	X	X	X	X
	Circulate substitute list						X
	Materials distribution	X	X	X	X	X	X
During the session	Technical details to monitor (batteries, image)	X	X	X	X	X	X
	Session specific instructions	X	X	X	X	X	X
	Facilitation reminders	X	X	X	X	X	X
	Reminders re data to collect				X	X	X
After the session	Dictate researcher reflection	X	X	X	X	X	X
	Transfer previous session data to hard drive		X	X	X	X	X
	Label and file all data carefully					X	X
	View video, listen to audio, create transcript	X	X	X	X	X	X
	Content analysis per data source		X	X	X	X	X
	Thematic analysis per data source		X	X	X	X	X
	Summaries per data source		X	X	X	X	X

(Table Continues)

(Table Continued)

	Session summary including recommendations	X	X	X	X	X	X
	Identify themes across data sets			X	X	X	X
	Collate answers to research questions	X	X	X	X	X	X
	Consult with critical friends	X	X	X	X	X	X
	Update data inventory	X	X	X	X	X	X
	Prepare action research cycle for next session		X	X	X	X	X
	Prepare agenda and materials for next session		X	X	X	X	X

Step Five. Participant Responses to Activities and Rough Transcripts (RA)

Multiple prolonged periods of engagement with participants in this cohort study generated extensive video and audio records of each session. Both types of records were invaluable for me as the researcher. They prevented any loss of data and there were many points in the analysis process when it proved critical to have used two video cameras and one digital recorder throughout the cohort sessions. Reviewing the visual and auditory recordings allowed me to become intimately familiar with the dialogue and non-verbal communication that occurred throughout the sessions. This careful listening to participants' voices deepened my awareness of, and insight into, the group's interpersonal dynamics, perspectives and interests. I combined what I learned from reviewing all three data sources to create a detailed record of each session. I referred to this data set as the "Participant Responses to Session Activities and Rough Transcripts", (Response to Activities or RA for short).

The first purpose of the RA was to establish an exact chronology for each session. This chronology included identifying the time at which each specific learning experience took place, how long it lasted, and the order in which experiences and unstructured time

such as breaks, took place. For a variety of reasons adjustments were frequently made to the planned agenda for each session, rarely to the content of the session but frequently in the timing or sequencing of activities and breaks. The RA captured the specific way each agenda was enacted and allowed me to create the logic model which summarized each session in chart format.

The second purpose of the RA was to document the facilitation of session activities including all verbal and non-verbal direction given to the group for each specific learning experience. This aspect of the RA included not only my own facilitation of learning activities but also facilitation by cohort members. Capturing the actual words used to introduce, explain or provide feedback during learning activities was very helpful in understanding participant responses to those activities. A secondary aspect of facilitation is transitioning between activities. Creating the RA allowed me to take note of ways in which I was facilitating transitions and the effectiveness of the various approaches. This aspect of the RA supported me to reflect critically upon my own practice as a facilitator.

The third and perhaps most important purpose of the RA was to capture participants' verbal and non-verbal responses to the activities of each session. Through the video I was able to observe and document individual participant's responses to each specific learning experience as well as the reactions and engagement of other cohort members. An unplanned benefit of videotaping complete mornings and afternoons during cohort sessions was that I was also able to observe what happened during unstructured breaks. I gathered important information by noting topics of conversation and observing interactions between participants. Over time I came to realize that all conversations were

related to the topic of teacher leadership for social justice. This realization allowed me to relax about break time length, recognizing that all of the conversations during unstructured time contributed to developing members' agency as social justice leaders in schools.

The format of the RA remained consistent throughout the six sessions. Using what I could hear from all three recording sources, I created a running record of each day on a continuous multi-page table. In the large right hand column I typed a rough transcript of all the dialogue I could discern from the three video and audio sources. When a new learning experience began I started a new section and gave each section a title in the left side column. To increase clarity I also started a new section when I was recording different conversations in small groups or partners, even if they were for the same learning experience.

RA length ranged from 18 pages in Session Four, to 36 pages in Sessions Five and Six. Basically the length increased as the sessions proceeded, with the exception of Session Four. This was a session in which there were prolonged periods of silent reading, and some small group work preparing presentations. I chose to document only the presentations as I was unable to pick up conversations during group work through either audio or video. The longer RAs contained more partner and small group conversations as I learned to capture more voices by strategically placing the recording devices. In the later sessions I recorded which data source best captured particular conversations, to facilitate retrieval of the data. One unconscious practice I found upon reviewing the RAs was that I recorded my thoughts within square brackets [] and my observations of non-verbal communication in round brackets ().

Once completed, I used each RA to generate reports on each specific learning experience for each session. For each specific learning experience I generated a descriptive summary of participants' responses, thematic analysis of the content, and synthesis of the analysis to be inserted into the session summary. Sometimes the RA's were the only data source for these learning experience reports, but often they were supported by other data sources such as participant journals, action research cycles or artifacts. As a central data collection and organization tool, the RA's documented the session as experienced along with all dialogue and participant responses and were invaluable starting points for the documentation and analysis of each leadership development session.

Step Six. Participants' Reflections

At the end of each session I allocated time for participants to reflect on the day and provide me with feedback on their experience. This was done to democratize decision-making and increase the responsiveness of my facilitation. The format for these reflections remained fairly consistent throughout the six sessions with a few notable variations. The initial one page format appearing in Figure 26 provided four prompts designed to provide me with the feedback required to move forward in planning for future sessions. These prompts were effective and generated useful feedback. When I varied the format slightly in Session Three, I discovered the new wording was not as clear and the responses were much harder to analyze (Figure 27). I think this was due to different interpretations of the word "challenging". I was hoping to identify which learning activities participants found made them think in new ways, but instead I got

emotional reactions to the assigned task. Consequently, I returned to using the original form for subsequent sessions.

<p>Understandings confirmed for me today</p> <p>!</p>	<p>Topics I am interested in exploring further</p> <p>...</p>
<p>Activities which helped me today and why</p> <p>+</p>	<p>Suggestions, requests, ideas for session #</p> <p>?</p>

Figure 26. Participant reflection and feedback forms for sessions 1, 2, 4, 5 and 6.





<p>Activities I found challenging and why</p> 	<p>Content I value learning and why</p> 
<p>Activities that helped me learn and why</p> 	<p>What I would like to do in future sessions</p> 

Figure 27. Participant reflection and feedback forms for session 3.

Also, beginning with session 3, I added a second page to the participant reflections as shown in Figure 28. I started asking participants to make observations on themselves in the group, the group as a whole and the design and facilitation of the sessions. This was done to introduce a sense of shared responsibility for the sessions and to draw attention to the intentionality with which facilitators design professional learning sessions. I also wanted to introduce the notion of critical reflection and having difficult conversations within the cohort. I thought that this format might cause some discomfort

to surface within the group and provide fodder for further conversations. I also wanted to invite critical feedback on my own facilitation. One of the tensions in this study was my positionality as facilitator and researcher. Comments on this form was one way I felt I could get a sense of how my behaviour was affecting the group. It ended up being very useful as I got feedback on the pacing of sessions.

	Strengths	Stretches
Group as a Whole		
Self in Group		
Design Facilitation of Sessions		

Figure 28. Participant reflection and feedback form for session 3.

As the sessions progressed I started asking for goals as another way to invite action planning and promote critical thinking (Figure 29). Responses on this second page of the feedback gave me a lot of insight into the support people felt in the group; the self-talk individual participants were engaging in during the sessions to maximize their learning and what they appreciated in adult learning environments.

Date	Stronger this Session	Current Challenges	Suggested Goals
Group			
Self			
Design Facilitation			

Figure 29. Participant reflection and feedback form for sessions 4, 5 and 6 (no goals column in session 6)

Participants' responses. Participant responses to the previously identified prompts were very useful in providing direction for future sessions. Analyzing the responses to “understandings confirmed for me today” gave me insight into what was resonating for people and which topics were valued. Analyzing the responses to “topics I am interested in exploring further” helped me know topics the group was interested in pursuing in greater depth. I used these comments in identifying goals for subsequent sessions. Responses to the third section prompt, “activities which helped me learn and why” provided feedback on which aspects of each session were helping people learn. I used these responses to select effective strategies for subsequent sessions. As the year progressed activities repeatedly surfaced in this section which helped to identify those specific activities which were having a significant impact on individuals and their learning. Finally, comments listed in response to the prompt “suggestions, requests and ideas for session #” helped me recognize potential gaps in the program and ways to

strengthen the cohort experience. The themes listed under each column heading in Table 9 synthesize ideas that surfaced in the participant reflection data summaries and were then included in the researcher action research cycles. The number in brackets after each descriptor represents the number of times that theme was selected as significant in Session one to six participant reflection summaries. Themes were also present to some extent in other sessions.

Table 9

Summary of Themed Data Resulting from Participants' Reflections and Feedback Forms (Sessions One to Six)

Confirmed	Interested	Helped	Suggested
Change process (6)	SJ concepts, challenges and resources (6)	Action research (5)	More time for critical reflection and dialogue (5)
Cohort (4)	Leadership for SJ (4)	Researcher facilitated activities (5)	Logistics (4) pace, materials, drinks, next steps
Leadership (3)	Change process (3)	Cohort member facilitated activities (4)	Movement (3)
Self-awareness (3)	Communication skills (3)	Journaling (4)	Varied learning and grouping processes (3)
Research design (3)	Understanding groups (1)	Small group dialogue (3)	More journal writing (2)
	Cohorts (1)	Self-assessment and peer feedback (3)	Sharing individual successes (2)

Note: Frequencies appear in brackets.

As mentioned earlier, additional prompts provided for participants on the second page of the Participant Reflections (Figures 28 and 291) included space for members to identify strengths, challenges and goals for the group, themselves in the group, and the design and facilitation of the sessions. Table 10 presents the themes that emerged from an

analysis of comments on page two of the participant reflection summaries. This feedback was powerful in that it allowed me to get inside the experience of each participant.

Table 10

Summary of Themed Data from Participants' Reflection and Feedback Forms (Sessions Three to Six, page 2)

Focus	Strengths	Challenges	Goals
Group	Articulate Comfortable Risk-takers A shared focus High level of participation	Staying on task Deepen thinking Sharing the "floor" Time Challenging others	Support after cohort
Self	Participation Meaning making Reaching out Comfort Positive energy Listening Strong skills Self-awareness	Monitor participation Stay open Be non-judgmental Focus Engagement Fatigue Sustainability	Action research Learning-focused conversations Focus for next session Follow through
Design Facilitation	Structured design Responsive facilitation Time to reflect, read and write Group work Flexibility and flow	Timing Balance Variety AR debrief Movement Pacing Ambitious agenda	Simplify focus Maintain flexibility Critical content

The group section gave me very positive feedback about how valued and privileged participants felt to be a part of such a strong group of committed individuals, yet also ways in which they thought the group's work could be strengthened. Participants' influence on the leadership development sessions and desire for intense personal challenge increased over time. As the final sessions drew nearer research participants

anticipated the loss of the group's support and commented on their desire to continue the group and expand to include new members.

The individual section gave me insight into personal challenges participants were confronting during the session. Individual members reported challenging themselves to be a better listener, to speak more often and to demonstrate more optimism and acceptance. Some individuals struggled to deal with fatigue and defeat in their work environments and their unexpected negative impact on others. Some people were struggling to remain positive and to demonstrate consideration of others. By reading their responses, I often discovered aspects of individual participant's experiences in the session that I had not previously known. I was impressed with the intentionality with which participants were monitoring their own behaviour and participation in the cohort sessions.

The section on design and facilitation provided positive feedback about the elements of the session design that were working effectively for participants. Furthermore, they gave me insight into what it was they found challenging. The overall message I received from participants was to slow down and allow time for people to go deeper and be more critical in their thoughts and conversation. Whenever I planned too ambitious an agenda or seemed too focused on completing everything listed, they told me so. They acknowledged when I was able to relax and be more flexible and the positive impact that had on their learning. I feel that the feedback I received on the second page of the Participant feedback forms helped improve my facilitation of the sessions and deepened my understanding of the group.

One final note about participant feedback concerns the reliability of the feedback. The atmosphere we were able to co-create within the cohort facilitated the sharing of

feelings and opinions. I didn't feel that members were trying to please me by giving only positive feedback. They took their task very seriously and provided thoughtful and perceptive feedback which I was able to use to improve subsequent sessions and strengthen my understanding of each participant.

Step Seven. Researcher's Reflections

The researcher's reflections were dictated into a digital recorder after every session and I also wrote to capture my thinking and actions during different stages in the research process. These reflections were analyzed by date and summarized in the subsequent session summary. In the first two sessions, I focused a lot on documenting the steps I followed in processing the data. I recorded the timeline followed, and in one instance, all the files I had created. By Session Three this process had been replaced with a data analysis chart which organized and formalized my analytical process and helped me track my process through those steps for each set of data.

Although not pre-determined, right from the first session it was clear that there were four categories of comments included in my reflections: facilitation, research process, the cohort and logistics. Beginning with the Session Two Summary, I organized my researcher's reflection content onto charts using the identified headings. These charts served to summarize the content in an organized manner and gave me easy access to the information such as suggestions for the next session. Over time these charts became more significant in my session summaries. I frequently opted to include them in their entirety to make sure I would have easy access to this content and be able to track the origin of specific ideas or strategies I would use in cohort sessions or the larger study.

When I review the charts generated as a result of analyzing my reflections for each session, I discern patterns in my observation topics which have been summarized and condensed in Table 11. The numbers in brackets indicate the number of sessions during which comments on that topic were recorded. There are some grey areas in terms of how I chose to sort the reflective comments. In Session One for example I included all facilitation observations under the heading of facilitation. By Session Two I was starting to distinguish between facilitation of the session and facilitation of the research process. This distinction moved some of those comments about facilitation strategies onto the research process charts and explains why two categories, researcher's role and strategies, are found in two different columns.

Table 11

Summary of Themed Data Resulting from the Researcher's Reflections

Facilitation	Research Process	Cohort	Logistics
Researcher role (6)	Data collection	Individual	Food (6)
Research related (6)	Tools (6)	Observations (6)	Timing (4)
Ideas for next session (5)	Analysis and themes (5)	Group observations (5)	Technical (4)
Facilitation strategies (5)	Session strategies (5)	Impact (4)	Materials and resources (4)
Cohort members as facilitators (4)	Researcher's role (4)		Community building (4)

Note: Frequencies appear in brackets.

Another observation I noted when reviewing the researcher's reflection charts was how often I used the reflective process I engaged in at the end of each leadership development session to speculate and plan. I frequently returned to these charts when planning for the next sessions, as by the time I reached that stage in the planning process for each session, time would have passed and I needed my memory activated. The way I

recorded and processed research reflections created a concrete record of my thinking and research process throughout the study. It is how I made sense of the data and pondered my way through dilemmas that arose in analysis and interpretation. By treating my reflections as a data source for a particular session, I ensured I revisited them in a timely manner and reflected on my observations during the study. The nature of action research meant that the reflections were time sensitive and needed to be reviewed and analyzed prior to subsequent sessions.

Step Eight. Logic Models: Sessions as Experienced

A logic model (James et al., 2008) is a graphic organization tool used to capture experiences in a systematic and efficient manner. The logic models consolidated the key features of each session and facilitated comparisons between sessions. The logic models all followed the same structure and chart format. The first portion of the logic model lists each specific learning experience along with its purpose, my observations and feedback from the participants. The second part of the logic model provides descriptive statistics including the length of each session, the amount of time and percentage of the day spent on each specific learning experience, the name of the facilitator, the researcher's role and the size of the group. Once each logic model was created I synthesized and analyzed its content in writing. A copy of the logic model and a summary of this analysis were included in each Session Summary. To keep the research process transparent and activate recall, participants were provided with a copy of the logic model at the subsequent session. I will share what I learned from each section of the logic model in the order in which they are included on the models: Learning Processes, Purposes, Observations and

Statistics. Figure 30 shows an excerpt of this first part of the logic model for Session Two.

Time	Learning Process	Purpose	Observations	Feedback
8:30-9:10	<i>Snacks and Visiting</i>			
9:10-9:25 (15)	Since Last We Met	Reconnect, ease transition, acknowledge multiple pressures	Stunned initially then reflective, high level of trust, safe to be vulnerable, good insight into peoples' state of mind, went deep right away, took longer than expected	Liked the activity. "Since last we met keeps this real acknowledging that we are all somewhat overwhelmed but also seeing that since last time there has been a shift – people view our meetings as a reprieve."
9:25-9:35 (10)	Find Your Natural Partners	Differentiate pairings, build community, fun, refresh memories of session one	Confusing?, challenge to remember specifics, refresh re names and work sites, collaborative problem solving	
9:35-9:55 (20)	Reflective Journaling	Focus, therapeutic, reflective	Highly engaged, very quiet, non-stop writing, led to relaxation, appreciated, reduced anxiety?	Value journaling (1) and reflecting (1)
9:55-10:30 (35)	Key Concepts Key Ideas	Member Check, seek clarity, synthesis of past shared experience	Intrigued, curious, varied approaches in each pair, sharing, partners influences discussion, engaged and positive response	Themes (3) "I very much appreciated the work put into the "10 themes" handout, it was a great summary of the first session."
10:30-10:45 (15)	Session One Researcher AR Cycle	Model AR process, transparency, exemplar	Structure seemed to help, written material can continue to support between sessions, logic model and charts showed value of group thinking, seemed to facilitate transition to their own AR cycles, diverse responses, private about contents	Enjoyed logic model (1) and "living the model" (1) questioning how to do the self-reflection piece (1), learning the steps in the AR model (1)

Figure 30. Excerpt of part one of the logic model developed for session 2 showing learning process, purpose, observations and feedback.

Learning processes. Specific plans for each session emerged in response to analysis of data collected in the previous session. Thus it was only upon analysis of all six logic models that I categorized six different learning processes incorporated into leadership development sessions: Action Research, Participant Feedback, Concept Development, Reflective Practice, Community Building and Design. Table 12 includes specific learning processes included within each learning experiences and the sessions in

which each specific experience occurred. Routine practices are identifiable by their presence in each of the six sessions.

Table 12

Cohort Learning Processes by Type, Specificity and Session

Learning Processes	Specific Learning Experiences	Sessions					
Action Research	Instruction	1	2		4		6
	Modeling	1	2	3	4	5	6
	Participant action research cycles	1	2	3	4	5	6
	Partner dialogue			3	4		6
	Large group dialogue	1				5	
	Journaling about action research		2	3	4	5	6
Participant Feedback	Theme review		2	3	4	5	
	Participant feedback on Sessions	1	2	3	4	5	6
	Feedback on the group			3	4	5	6
	Feedback on self in the group			3	4	5	6
	Feedback on design and facilitation			3	4	5	6
	Suggestions for next session	1	2	3	4	5	
Concept Development	Leadership Content		2	3	4		6
	Social justice content	1	2	3		5	6
	Skill development		2	3	4	5	
	Readings		2		4		
	Meaning making processes		2	3	4	5	6
Reflective Practice	Journaling	1	2	3	4	5	6
	Self-assessment	1					6
	Peer feedback			3		5	
	Processing Activities	1	2	3		5	6
Community Building	Sharing circle			3	4	5	6
	Movement breaks		2	3			6
	Get to know the group	1		3			
	Get to know the participants	1	2	3		5	
	Shared meals and breaks	1	2	3	4	5	6
Design	Design frame	1			4		
	Conceptual model	1					
	Research design	1					6
	Design for adult learning environments			3			

Purposes. There were five purposes set for learning activities that were discernible from the logic model summaries: community building, research, design, content and skill development, and self-awareness. Table 13 shows the relevant contents for each purpose by session. These five purposes were evident in all six sessions with the exception of self-awareness and design which were present in almost all sessions.

Table 13

Purposes and Contents of Learning Activities by Session

Purpose	Contents	Sessions					
		1	2	3	4	5	6
Build community	Community, relationship building	X	X	X	X	X	X
Research related	Transparency, validity,	X	X	X	X	X	X
Design	Principles, transitions	X	X	X	X		
Content and skills	Leadership, social justice, frameworks	X	X	X	X	X	X
Self-awareness	SJ beliefs, leadership skills, personal impact	X	X	X		X	X

Observations. The logic models included the researcher's observations of participants during the learning processes (Figure 30). Thematic analysis of researcher observations recorded in logic models across sessions, noted observation categories of engagement, enjoyment, interpersonal communication and learning and the specific contents for each category (Table 14). The most common observation concerned the high level of engagement by cohort members.

Table 14

Theoretical Analysis of Researcher's Observations Recorded in Logic Models by Session

Researcher's Observations	Contents	1	2	3	4	5	6
Engagement	Interested, curious, immersed	X	X	X	X	X	X
Enjoyment	Fun, laughter, energy, joy		X	X			X
Interpersonal	Flexibility, trust, diversity, relaxed, safety	X	X		X	X	
Learning	Conversations, meaning making, analytical		X	X	X	X	X

Statistics. The final section of the logic models considers the descriptive statistics recorded. Table 15 shows an excerpt of the statistical data portion of a logic model.

Table 15

Descriptive Statistical Data for Part Two of Logic Model for Session Three

Time	% of Total Minutes	Learning Process	Facilitator	Researcher Role	Group Size
8:30-9:00	<i>Snacks and Visiting</i>				
9:05-9:25 (20)	6	Opening video activity	Cathy	Participant	Large Group
9:25-9:50 (25)	8	Session Two Feedback	Cathy	Observer	Partners
9:50-10:10 (20)	6	What's the big idea?	Cathy	Observer	Trios
10:10-10:30 (20)	6	What's the big idea?	Cohort Members	Participant	Large Group
10:30 -10:45	<i>Break</i>				
10:45-11:00 (15)	5	Compass Points Four Directions	Cathy	Observer	Large Group
11:00-11:10 (10)	3	Predictable Dynamics in groups	Cathy	Facilitator	Large Group
11:10-11:40 (30)	10	Image Theater, Roadblocks	T	Participant	Large Group
11:40-11:55 (15)	5	Reflective journaling	Cathy	Observer	Individual
11:55-12:00 (5)	2	Partner Dialogue	Cathy	Observer	Partners
12:00-1:00	<i>Lunch</i>				
1:00-1:25 (25)	8	Participant Action Research	Cathy	Observer	Individual
1:25-1:35 (10)	3	Activity Break	N	Participant	Large Group
1:35-1:55 (20)	6	Cultural Mosaic	S	Participant	Large Group
1:55-2:00 (5)	2	Cultural Relevancy	Cathy	Facilitator	Large Group
2:00-2:20 (20)	6	Strengths and Stretches	Cathy	Facilitator	Individual
2:20-2:40 (20)	6	Partner Debrief	Cathy	Observer	Partners
2:40-2:45 (5)	2	Journal Writing	Cathy	Participant	Individual
2:45-2:50 (5)	2	Diamond Design	Cathy	Facilitator	Large Group
2:50-3:05 (15)	5	Participant reflections	Cathy	Facilitator	Individual
3:05-3:10 (5)	2	Suggestions for Session Four	Cathy	Facilitator	Large group

(Table Continues)

(Table Continued)

3:10-3:20 (10)	3	Sharing Circle One	L	Participant	Large Group
3:20-3:30 (10)	3	Sharing Circle Two	Cathy	Facilitator and Participant	Large Group
Total 315 minutes	99 %	21 Activities	5+ Facilitators	8P 7O 7F	12LG 3P 5I 1SG

Note: In Researcher Role column: “P” means Participant, “O” means Observer, “F” means Facilitator. In Group Size Column: “LG” means Large Group, “P” means Partners, “I” means Individual, “SG” means Small Group.

Table 16 considers the number, mean and diversity of facilitators per session.

Once again Session Three stands out as having the most facilitators due to the high degree of structure referred to previously. Session Six is significant in terms of facilitators because two of the three facilitators initiated their facilitation roles, rather than waiting to be asked. This finding reflects an increased level of comfort within the group and understanding of shared interests.

Table 16

Facilitators by Session

Facilitators	Session Number						Total Per Participant
	1	2	3	4	5	6	
Researcher	X	X	X	X		X	
G				X		X	2
J						X	1
K					X*		1
L			X		X		2
M					X		1
N		X	X			X	3
R		X					1
S			X				1
T			X				1
Total per session	1	3	5	2	3	4	TOTAL 13

Note: *Indicates that facilitation was spontaneous.

Table 17 describes the roles I played as researcher during each session. What is noticeable from these data is that my dominant roles were participant (6 sessions, mean of 7.3), observer (6 sessions, mean of 4.2) and facilitator (5 sessions, mean of 3.3). I deliberately stepped back from participation at times to allow the group to develop strong interpersonal connections. Higher frequencies of “researcher as facilitator” occurred in Sessions Two (6) and Three (7) when I incorporated a number of specific learning strategies into the leadership development sessions. Modeling, not surprisingly, was highest initially (Session One) when I was introducing the cohort to action research and the template they would be using. Also of interest is the scant use of presentation mode (mean 0.3). I was definitely more of a facilitator during cohort sessions than an expert making formal presentations of content. The one time in which I did use a more formal approach was to present visual models of the revised themes generated from analysis of data in Sessions One to Four.

Table 17

Researcher’s Roles by Session

Researcher Role	Session Number						# Sessions role present	Mean per Session
	1	2	3	4	5	6		
Participant	10	5	8	5	9	7	6	7.3
Observer	1	3	7	5	2	7	6	4.2
Facilitator	3	6	7	3	0	1	5	3.3
Modeller	1	1	0	0	0	0	2	0.3
Presenter	0	0	0	0	1	0	1	0.3
TOTAL	15	15	22	13	12	15		

Table 18 summarizes the use of grouping strategies employed during each session. Of particular interest is not the dominance of large (6 sessions, mean of 9) and individual (6 sessions, mean of 5) groupings, but rather the use of partner (6 sessions,

mean of 2) and small groups (4 sessions, mean of 1). Beginning with Session Three, the use of partners (3) shifted to triads (coded as small group) to accommodate the new member of the cohort. Combining the totals for partner (10) and small group (5) indicate that small group work was a significant and intense part of each cohort session, some participants indicated that for them the small group work was the most valuable.

Table 18

Grouping Strategies by Session

Size of Group	Session Number						# Sessions present	Mean
	1	2	3	4	5	6		
Large Group	9	9	12	7	7	8	6	9
Individual	6	6	5	5	5	4	6	5
Partner	1	2	3	1	1	2	6	2
Small Group	1	0	1	1	2	0	4	1
TOTAL	17	17	21	14	15	14		16

Table 19 summarizes the key characteristics of each session that emerged as a result of analyzing of the following documentary data sources: logic models, summaries of logic models, and logic model analysis included in session summaries. Summarizing each session under the headings of focus, observations, characterization and key activities provided a snapshot profile of each session. This synthesis of data provided a useful crosscheck for significant elements of the sessions as identified through other data sources such as session agendas, facilitation guides, participants' responses to activities and participants' and researcher's reflections. I also made use of metaphors to see if I could accurately capture the emergent characteristics of each session.

Table 19

Emergent Characteristics of Sessions

Session	Category	Key Components or Characteristics
One	Focus	Community building Establishing purpose Establishing baselines
	Observations	Statistics kept in minutes only initially
	Characterization	“Preparing for the journey” “Tilling the soil”
	Key activities	SJTLSA, carousel charts, research and design overview
Two	Focus	Figuring out research and group process
	Observations	Begin to collect feedback on analysis and themes Begin to reflect on role of the researcher Large amount of time in unstructured dialogue
	Characterization	“plan the garden” “order the bulbs” “draw a map”
	Key activities	Change process, leadership capacity, school context Dialogue, action research, theme feedback
Three	Focus	Group dynamics, get to know the group better Share design principles
	Observations	First sharing circle Many short activities Participant feedback includes self, group, design and facilitation
	Characterization	“troubleshoot the process” “adjust the soil”
	Key activities	Image theater, effective groups jigsaw, peer feedback, Mosaic
Four	Focus	Reconnecting after break, revisit initial focus Content: equity, leadership, dialogue, transformative Learning going deeper with skills
	Observations	Intense content Assigned groups
	Characterization	“communication skills”
	Key activities	Reading and presenting articles, fierce conversations, synectics, action research learning-focused conversations
Five	Focus	New action oriented focus through learning-focused conversations and fierce conversations Skills for action and personal awareness
	Observations	Atmosphere shift to more relaxed (theme revision completed)
	Characterization	“forcing the bulbs”

(Table Continues)

(Table Continued)

Five	Key activities	Fierce conversation practice, social justice video, Valentine, Johari's window, social justice lens re inclusion, fair trade, meetings, Aboriginal education
Six	Focus	Reflection focus Data collection
	Observations	Very intense thinking and processing
	Characterization	"looking at the harvest" "harvest time"
	Key activities	SJTLSA, SAR, COSL chair visit, member presentations

The logic models served as a very useful organizational device throughout the study. They facilitated comparison, analysis and accountability. When asked to respond to the logic model as a research and learning strategy during Session Four, participants indicated they were comfortable with the process and found the models both accurate and a valuable strategy for activating recall. For them, the models revealed tensions between optimism and cynicism, as well as pro-active and reactive stances, and surfaced times of challenge and discomfort. By synthesizing one session at a time, the logic models facilitated making comparisons between sessions, simplified thematic analysis, and provided transparency about my decisions as facilitator and researcher.

Step Nine. Session Summaries

Session summaries were developed as a way for me to synthesize the content and ongoing analysis accumulated for each cohort session. By producing a written summary I was able to consolidate materials created for, used during, and created in response to each session. Creating the summary brought my work on each session to a close (for the time being), and symbolized the beginning of the next phase, which was preparing the action research cycle goals for the subsequent session.

The format I adopted for the session summaries had three distinct sections as shown in Table 20. The first section provided a chronology of the session’s learning activities, following the order of the logic model. Each sub-section heading named a different learning experience on the day’s agenda. Within each experience’s sub-section I followed a standard structure in my writing. In the first paragraph I described the experience, its purpose and instructions given to participants. Paragraph two was composed of my observations of the experience and those of the participants as recorded on the participants’ reflections. The third paragraph of each sub-section was devoted to the findings or what was learned from a content and thematic analysis of the data collected for that particular experience. Occasionally I veered away from this format to extend the findings section. This departure occurred most often when the specific learning experience was designed as a data collection strategy such as the analysis of the self-assessment (SJTLSA) results in Sessions One and Six or the “Growth, Change and Impact Carousel” chart experience in Session Six. The length of these chronology sections ranged from seven (Session Four) to 19 (Session Six) pages with an average of 12 pages overall.

Table 20

Session Summary Components

Session Summary Components	Session Number						
	1	2	3	4	5	6	Total
Section One: Chronology							
Chronology and Description of Session Learning Experiences	X	X	X	X	X	X	6
Section Two: Logic Model and Researcher’s Reflections							
Logic Model	X	X	X	X	X	X	6

(Table Continues)

(Table Continued)

Researcher's Reflections	X	X	X	X	X	X	6
Section Three: Appendices							
Agenda	X	X	X	X	X	X	6
Researcher's Action Research Cycle(s) Number	1	1	3	3	4/5	5/6	6
Logic Model	X	X	X	X	X	X	6
Themes Description	X	X	X	X	X	X	6
Theme Feedback Synthesis		X		X			2
Participant Reflection Blank			X	X			2
Participant Reflection Synthesis					X	X	2
Design Frame, Conceptual Model	X						1
References, Carousel Chart Synthesis	X						1
Length of Sections (Pages)	1	2	3	4	5	6	Mean
Section One	14	12	11	7	8	19	12
Section Two	4	7	6	5	7	2	5
Section Three	16	11	16	17	14	9	14
Total Length	34	30	33	29	29	30	31

The second section of the session summaries contained analysis summaries of the Logic Model and the Researcher's Reflections. Other additions to this section in some summaries were timelines, a list of files created, analysis of conversations with critical friends and a summative reflection on the session. The length of these second sections of the summaries ranged from two (Session Six) to seven (Sessions Two and Five) pages, with an average of five pages overall.

The third section of the session summaries formed the Appendices. Items that were consistently included in the Appendix for each summary were the Agenda, Logic Model, completed Researcher's Action Research Cycle and the Themes document generated from analysis of session data. Items that were often included were either a blank participant reflection template (2) or a synthesis (2) of the responses; a synthesis of

the theme feedback (2); and a copy of the partially completed action research cycle for the subsequent session (2). Session One summary also included the Design Frame, Conceptual Model, References and transcribed Carousel Charts from a Session One learning experience. In subsequent session summaries I did not include copies of all material used in the sessions, however for Session One the design frame and conceptual model were critical to the design of the cohort. The length of the third sections of the session summaries ranged from nine (Session Six) to 17 (Session Four) pages with an average of 14 pages overall.

The session summaries ranged in total length from 29 to 34 pages with an average length of 31 pages. When I looked at the summaries in comparison to each other I noticed a few anomalies. Judging from the fact I included action research cycle one in both Session One and Two summaries, and cycle 3 on Session Three and Four summaries, I seemed to be inconsistent as to whether I was including the cycle shared with participants during the session (from the preceding session) or the one completed as a result of the analysis of that session's data. Another inconsistency occurred when at times I synthesized all the Researcher's Reflections onto one set of charts and at other times reported on each reflection separately. Inconsistencies were also noted around whether to include blank templates or synthesized responses on the templates, for the theme feedback and the participant reflections.

I also noticed some gaps in the data included in the summaries. Clearly Sessions Two and Four needed copies of the appropriate action research cycle. It might have been best actually to follow the format from Sessions Five and Six and include both the completed cycle from the session and the partially completed cycle for the subsequent

session. This reflects more accurately exactly where I was in the process at the time of creating the summary. As indicated in the circular diagram at the start of this section, the action research cycles were completed after the session summaries as I began to prepare for the next cohort session. So whether or not they were included and which cycle was included depended on at which stage I included the cycle in the session summary. This may be an inherent challenge when following a cyclical process!

Step Ten. Cumulative Themes

As a method of synthesizing what I was learning from each session I created a thematic summary after each session. The themeing (sic) (Saldaña, 2013) of this data was an iterative process involving participants. Analysis was undertaken in two phases.

Phase one. During phase one written theme descriptions were shared with cohort participants during the sessions. Participants were asked to provide critical feedback on the themes in Sessions Two, Three and Four. During Sessions Two and Three, cohort members worked with a partner to submit a joint feedback form, in Session Four, feedback was submitted individually. Changes that were made in response to participant feedback on the phase one themes included wording, content, formatting, headings and emphasis. I then synthesized the feedback from participants and created a new version by revising the theme descriptions in response to their suggestions. Then, when each new session summary was complete I generated new content for the revised version of the thematic statements. This new version would be the thematic description shared in the subsequent cohort session.

Versions one and two of phase one, consisted of ten themes with one or two word titles, each description was between two to four sentences in length. The themes were not

numbered but rather presented in an order which seemed logical to me. Version three consisted of 14 themes with one to five word titles and descriptions of between three to ten sentences. Version four had fifteen themes with few changed titles, bulleted statements beneath each heading and a portrait format. Table 21 shows the shifts in theme headings through versions one to three of phase one.

Table 21

Evolution of Themes (Phase 1)

Phase One		
<i>Version 1 (Session 1 and 2 Themes)</i>	<i>Version 2 (Session 3 Theme Headings Revisions and Additions)</i>	<i>Version 3 (Session 4 Theme Headings Revisions and Additions)</i>
Direction	Direction and Vision	Direction and Vision
Optimism	Optimism and Strength-Based Approaches	Optimism and Strength-Based Approaches
Curiosity	Curiosity and Growth in Understanding	Curiosity and Growth in Understanding
Agency	Agency for Change	Agency for Change
Consistency	Consistency Embedded Throughout	Consistency Embedded Throughout
Relationships	Positive and Collegial Relationships	Positive and Collegial Relationships in the Context of Change
Context	School Culture and Context	School Culture as Context
Diversity	Cohort Strength Through Diversity	Cohort Strength Through Diversity
Equity	Equality vs. Equity	Equality vs. Equity
Leadership Capacity	Leadership Capacity	Leadership Capacity
	Empathy	Empathy
	Wellness	Wellness
	Design and Structure of Adult Learning	Design and Structure of Adult Learning
	Engagement in Specific Processes	Engagement in Specific Learning Processes
		Valued Aspects of the Cohort Experience

Note: Changes indicated in blue.

Phase two. Phase two of the themeing began with a total reorganization of the theme descriptions generated through the first three sessions. To generate the phase two

structure I cut up every statement in phase one version four and grouped like ideas together until a thematic structure evolved. The four main theme topics that emerged from sorting the theme statements correlated with the research questions. The first theme focuses on Change Agency, second on Adult Learning, third on Cohort as Community and fourth on Model Development. Once all the statements were sorted into the four themes I worked within each theme to create sub-topics and recorded the thematic structure as an outline. The revised framework phase two version one (Table 22) was shared with cohort participants during Session Five and received a very positive response. They spontaneously said things like “I like it” “Yes” “that’s it” and they raised no questions and made no suggestions for revisions. The new structure seemed to have the capacity to capture the richness of the data and also resonate with participants.

Table 22

Evolution of Themes (Phase 2)

<i>Phase Two: Version One Re-sort of S1 to S3 Themes</i>			
Change Agency	Adult Learning	Cohort as Community	Model Development
TLSJ Strategies <ul style="list-style-type: none"> • Action Strategies • Sustainability Strategies 	Adult Learning Principles <ul style="list-style-type: none"> • Overview • Balance and Design • Facilitation Challenges • Breaks 	Cohort Composition	Critical Content <ul style="list-style-type: none"> • Personal Growth • Direction • Sustainability • Engaging Others • Working with Groups • Change Process • Leadership Capacity • Equity • Wellness • Crucial Conversations • Paraphrasing • Transformative Learning
TLSJ Beliefs	Adult Learning Processes <ul style="list-style-type: none"> • Overview • Self-Assessment • Reflective Journaling • Dialogue • Action Research • Learning-focused Conversations • Peer Reflection 	Participant Qualities	Research Process <ul style="list-style-type: none"> • Researcher Reflections • Theme Feedback • Action Research Cycles • Logic Model • Critical friends • Time
Relationships During Change		Productive Cohort Processes <ul style="list-style-type: none"> • Shared Facilitation • Sharing Learning 	
Context of Change			
Principles of Practice			

One new sub-topic, “Impact”, was added after analysis of Session Five data. In response to Session Six content, “Johari’s Window” and “Valentines” were collapsed into the new sub-heading of “Peer Feedback”. A new category was added for “revisions to the SJTLSA” and one for the “conceptual model” under theme four, “Research Process: Impact.” Table 23 shows the final framework for the Cumulative Themes after incorporating the new material from Sessions Four, Five and Six.

Creating and revising the themes as the study progressed allowed me to come closer to capturing the experiences of participants. As the themes were reviewed during cohort sessions many interesting conversations developed as participants struggled to articulate exactly what they were experiencing. The content of these themes feature prominently in Chapters Seven to Ten where I focus on answering my four research questions.

Table 23

Phase Two: Final Framework of Cumulative Themes

1. Change Agency

- TLSJ Strategies
 - Action Strategies
 - Sustainability Strategies
- TLSJ Beliefs
- Relationships During Change
- Context of Change
- Principles of Practice

2. Adult Learning

- Participants’ perceptions of how they learn best
 - Balance and Design
 - Facilitation Challenges
 - Breaks

(Table continues)

(Table continued)

- **Adult Learning Processes**
 - Overview
 - Self-Assessment
 - Reflective Journaling
 - Dialogue
 - Action Research
 - Learning-focused Conversations
 - Peer Reflection
 - Fierce Conversations Role Play
-

3. Cohort as Community

- Cohort Composition
 - Participant Qualities
 - Productive Cohort Processes
 - Shared Facilitation
 - Sharing Learning
 - Sharing Circle
 - Peer Feedback
 - Cohort Evolution
-

4. Model Development

- **Critical Content**
 - Personal Growth
 - Direction
 - Sustainability
 - Engaging Others
 - Working with Groups
 - Change Process
 - Leadership Capacity
 - Equity
 - Wellness
 - Crucial Conversations
 - Paraphrasing
 - Transformative Learning
- **Research Process**
 - Researcher Reflections
 - Theme Feedback
 - Theme Reorganization
 - Action Research Cycles
 - Logic Model
 - Critical friends
 - Participant Reflections
 - Role of Researcher
 - Facilitation Guides

(Table continues)

(Table continued)

- Time
 - Impact
 - Participants
 - Schools
 - Conceptual Model
 - Leadership Development Model
 - Theoretical Framework
-

Process-Folio of Researcher's Action Research Inquiry: Concluding Remarks

The ten step process described above was developed to capture the process of designing and delivering the leadership development sessions and analyze the data sets generated for, during, and as a result of each session. I designed the process to ensure I would be thorough, deliberate, thoughtful, analytical and reflective as I worked through the six action research cycles. Each action research cycle provided direction, structure, documentation, and, ultimately, impetus for a new cycle. As I moved through the six action research cycles I refined each step in the process to increase its effectiveness and potential to answer the question I posed in step one of each cycle: "How do I facilitate TLSJ cohort sessions to develop the agency of teacher leaders for social justice?" Following an action research methodology allowed me to build upon my prior experience, model the action research process for participants, and engage in multiple cycles of inquiry. It ensured I remained in a critical reflective stance throughout the sessions as I was constantly reflecting upon and analyzing my practice as both researcher and facilitator of the TLSJ cohort.

Conceptual Model for Action Research Inquiry

The ten data steps introduced, explained and analyzed in this chapter are visible in Figure 31. The words added below the name of each strategy articulate the ways in which



Figure 31. Documentation and analysis process for researcher's action research inquiry indicating purpose and benefits of each.

the research benefited from each approach. Each step in the process contributed valuable insight into my research question about how to facilitate the leadership development sessions so as to develop the agency of participating teacher leaders. The design frame set the purpose and expectations for leadership development sessions. The researcher's action research cycles provided direction and a process for planning and decision-making. The session agendas provided a vision and structure for each day the cohort spent together. The facilitation guides helped me articulate with specificity the learning activities planned for each session and prompted me to develop a script to use in providing instructions to participants. The researcher's checklists reminded me to pay careful attention to the logistics for each session and helped me to develop and articulate my research techniques. The response to activities (RA) generated from video and audiotapes of each session documented what transpired and made participant and researcher voices accessible for analysis. The participants' reflections provided feedback on the effectiveness of each session and collected valuable suggestions as input for subsequent leadership development sessions. My researchers' reflections captured my observations during and after sessions ended and when doing analysis. When reflecting on the sessions I often speculated about future learning activities, session content and possible interpretations of the data. The logic models organized the data to facilitate comparison between and analysis of leadership development sessions according to different indicators. The session summaries provided me with a manageable account of each session and contained a session so I could proceed to planning for the next one. Finally, the cumulative themes facilitated synthesis and analysis of session findings and articulated emergent insights into the research questions.

Summary of Chapter Six

In this chapter I have laid out the decisions made during the cohort sessions and provided a rationale and audit trail for those decisions. Reason and Bradbury (2001) identify this as the main purpose of the action researcher, “The primary ‘rule’ in action research practice is to be aware of the choices one is making and their consequences” (p. xxvii). I also outlined the data sources I consulted, developed and used to track my process, thinking and facilitation of the leadership development sessions and the larger research study. It is this detailed and focused process which enabled me to sift through the multiple forms of data and distill what I was learning about the type of leadership development model which would most effectively develop the agency of teacher leaders. It is also the process by which I consulted cohort members and solicited critical feedback on my own interpretations, two essential practices in social justice and critical research. Similarly, the processes outlined in Chapter Five described the emergent, reflective and dialogic processes used in developing the self-assessment tool.

What follows in the next four chapters is what I have learned from this process about the aspects of the leadership development sessions that were resonating for study participants. Each chapter corresponds to one of the four research questions and the content of these chapters synthesizes what was learned through the theming process described in this chapter and analysis of the multiple sources of data identified in Chapter Four. Findings will be interpreted by making connections to the theoretical and research literature related to each topic presented in Chapter Two. Chapter Seven focuses on the first research question: What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?

Chapter Seven: Knowledge, Skills and Dispositions of Teacher Leaders for Social Justice

Chapter Seven Overview

The previous two chapters described the processes used in developing the self-assessment and peer reflection tools and my action research inquiry into my facilitation of the leadership development sessions. In this chapter I outline what I have learned through these processes and others concerning the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools. What is it that a teacher leader needs to know, believe, and be able to do to serve as a critical agent of change in schools?

There are two sections to this chapter. The first section answers the research question: What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools? The second part of the chapter explores the theme of change agency developed with input from participants over the course of the leadership development sessions.

Data Sources for Research Question One

Data sources which have informed my responses to this research question belonged to different phases of the study. In the tool development phase I did an extensive review of the literature which informed the content of the instrument's items. These items were clarified, revised and expanded upon through the three focus groups, of teacher leaders, school leaders and social justice activists, and through pilot testing. Consequently, the 75 items of the SJTLSA (Figure 19, p. 181) reflect the knowledge, skills and dispositions for teacher leaders for social justice as reported in the literature,

including previous self-assessment tools, and subsequently validated in the field. Two sections of the SJTLSA instrument align with each key concept in the research question. The “Knowledge” and “Personal Experiences” sections of the SJTLSA contribute to answering the knowledge segment of the research question. The “Leadership Skills” and “School Context” sections of the SJTLSA inform the skills aspect of the research question. Finally, the “Personal Attributes” and “Dispositions” sections of the STJLSA present data applicable to answering the dispositions portion of the first research question.

During phase two of the study, the leadership development sessions revealed further insights into the knowledge, skills and dispositions of teacher leaders from the perspectives and experience of research participants. During the first session the research participants, teacher leaders active in the field of social justice, named strategies they use in their social justice work. During subsequent sessions, participants’ responses to specific learning activities and analysis of data collected provided further insight into the knowledge, skills and dispositions of teacher leaders.

Table 24 aligns the specific data sources consulted in the two phases of the study. This table shows the triangulation process I used to consolidate the findings from the sources consulted to answer the research question. The first part of the chapter presents the knowledge, skills and dispositions of teacher leaders identified through this analysis. The second section presents the theme of change agency developed over the course of the leadership development sessions with input from research participants. I begin by exploring the kind of knowledge that empowers teacher leaders to be change agents.

Table 24

Data Forms and Sources by Session for Research Question One

Data Forms	Data Sources by Session						
	S1-S6	S1	S2	S3	S4	S5	S6
Observations	Video and Audiotaped sessions Researcher Reflections Field Notes						
Interviews	Participant Reflections Learning Focused Conversations (video S1, audio S1-S6)		Conversations with Critical Friends	Conversations with Critical Friends			Self-Assessment Reflections (SARs)
Artifacts	Researcher: <ul style="list-style-type: none"> Facilitation Guide Researcher Checklists LFC Questions Researcher Journal 						
	Prepared Session Materials: <ul style="list-style-type: none"> Agendas Logic Models Action Research Cycles Themes 	Design Frame Conceptual Model Carousel Chart Questions	Lambert Article	Strengths and Stretches	3 Articles Fierce Conversation handouts	Role play Scenarios Johari's Window SJ Lens Template	Carousel Chart Questions
	Materials collected during sessions	Carousel Chart Responses		Image Theatre Handout Group Profile	Article Presentation Charts		Carousel Chart Responses
	Participants: <ul style="list-style-type: none"> Participant journals Participant Action Research Cycles Emails 	SJTLSA's	Theme Feedback	Theme Feedback Peer Reflections (SJTLPs) Strengths and Stretches	Theme Feedback Peer Reflections	SJTLPs Valentines Johari's Window completed SJ Lens completed	SJTLSAs

Note: Data sources informing findings for research question one are in bold blue font. Additional data sources for research questions one include **focus group videos, tool drafts and revisions, pilot feedback.**

Knowledge

Seven knowledge themes emerged as findings from the first and second phases of data analysis of sources identified in Table 24. Phase one of analysis illuminated findings distilled from analysis of data collected during the focus groups and pilot test of the SJTLSA. Considered in this section are the Knowledge and Personal Experiences items of the SJTLSA. Phase two findings from the six cohort session summaries also relate to the knowledge supporting agency of teacher leaders. Table 25 shows how data triangulation was applied across data sets to identify the types of knowledge required by teacher leaders. Following the summary in Table 25, each of the themes is described in detail as synthesized from the various data sources. As well, other data are considered that emerged in the study and support the claims made concerning the knowledge themes.

Table 25

Data Triangulation: Knowledge Base Required by Teacher Leaders for Social Justice

Knowledge Themes	Phase One			Phase Two					
	Focus Groups Pilot Test	SJTLSA Content		Leadership Development Session Summaries					
		K	PE						
Social justice concepts and issues	X	X	X	1			4	5	6
Relevant forms of leadership	X			1		3	4		6
Change frameworks and the change process	X	X	X	1	2	3		5	6
Challenges of doing social justice work	X	X		1	2	3			6
Self, others and the potential of communities of support and challenge		X	X		2	3			6
How to facilitate groups of adult learners effectively	X	X			2	3			6
Learning frameworks	X	X	X		2	3		5	6

Note: “K” means Knowledge and “PE” means Personal Experiences.

It is deemed to be important for teacher leaders to have a strong knowledge base about issues and concepts of social justice to be able to provide effective leadership in this area. Important understandings supported in the data include the difference between equity and equality and how our individual privileges relate to global inequities. Equally important is to understand multiple dimensions of culture and cultural competency. These insights make it possible to appreciate the importance of cultural representation in curriculum and staffing as well as various dimensions of difference. Related experiences include having opportunity to identify inequities in a local context and envision more equitable communities on a larger scale.

Leadership frameworks are considered important knowledge for teacher leaders interested in creating movements for change. In particular, frameworks for social justice leadership, transformative leadership, teacher leadership and dialogic leadership practice were identified in the data and interpreted as critical. In the area of teacher leadership, findings indicate it is very important that information be shared on the different roles teacher leaders may assume in working for change. Other valued experiences that support knowledge development include opportunities to participate in a leadership development program or group. Surprisingly, data triangulation revealed no items in the Knowledge section of the SJTLSA that related to knowledge of leadership paradigms. Version 6 of the SJTLSA did however include an item that stated: "I am familiar with a variety of leadership paradigms such as social justice, transformative, distributive and teacher leadership" (Item 27, SJTLSA V. 6, p. 4). This item was removed after Focus Group Three when the social justice activists rejected it as a multiple concept question that was too focused on people's knowledge of terminology. This lack of consistency in the

knowledge content across multiple data sources would have been reduced if I had substituted a less vocabulary-laden question which addressed leadership knowledge.

Understanding and awareness of the change process and various frameworks which can support change are deemed to be critical for teacher leaders. Findings indicate that teacher leaders need to know how to initiate and enact the change process. Frameworks which participants and scholars found support the change process include action research and social constructivism. An action research framework can provide support and guidance for individual change agents and the dialogic nature of a supportive community increases participants' understanding and agency. Additional supportive frameworks were the social justice lens from the British Columbia Teachers' Federation (BCTF) and Circle of Courage (Brendtro, Brokenleg & Van Bockern, 2002). According to research participants, the social justice lens provoked and guided thought and the circle of courage developed insight. Another important aspect valued by teacher leaders in focus group one was the experiential knowledge of having taking action alone or as part of a group to create change. As in other areas of the research, experiencing a process, such as taking action or action research, surfaced in all phases of this study as an important pre-requisite to enacting specific frameworks or practices with others.

All data sources indicated that change agents working for social justice encounter roadblocks, obstacles and challenges in their work and need to be able to respond to challenges: "You need to have the information and education to be able to speak to the issue. A full understanding, openness and flexibility to think critically about the content" (SAR, Session Six). Teacher leaders need to know that encountering roadblocks is a predictable experience which can have grave personal consequences, and also be aware

of how to respond to the challenges they encounter in ways which can lessen their emotional impact. Based on the experience of participating teacher leaders and focus group members, knowing how to engage people in difficult conversations and mediate conflict are important types of knowledge for teacher leaders. Research literature, focus groups and research participants indicated it is important to have a group of supportive peers when one encounters hostility from colleagues or other constituencies of the educational system at any step in the change process.

Analysis of the SJTLSA items and the leadership development session data indicate that learning to know yourself and being open to learning from others in the community is essential for teacher leaders. Leadership for social justice presupposes individuals have a well-developed understanding of empathy and an ability to see issues from a variety of perspectives. Teacher leaders may find themselves in positions where they need to help their colleagues develop empathy or understand the importance of process to respond to an emotional experience. Having the opportunity to participate in “... a learning community focused on leadership development” (Item 60, SJTLSA) is considered a critical support in this process. Those who have had experience with such a community benefit from the opportunity to process their emotions and experiences with others. Communities which foster critical reflection and dialogue facilitate the integration of new learning into existing knowledge through social constructivism.

Knowing how to facilitate groups of adult learners effectively is an important area of knowledge for teacher leaders with strong support in the data. This type of work requires an awareness of how to facilitate groups so that every gathering is a learning experience reflecting careful design and attention to structure and strategies. SJTLSA

items indicate that knowing the characteristics of adult learners and being aware of how to create collaborative and safe groups supports facilitators in planning for adult learning. Research participants support this perspective: “I believe that teacher leaders need to understand clearly the how and the why of what they are trying to do – adult learning processes, critical theory, their own personalities and how they teach and learn the best” (SAR, Session Six). Responsive facilitation is critical to learn because effective leaders demonstrate flexibility and support effective processes which facilitate conversations that create change. It is considered advantageous to have had experiential knowledge of problem solving in groups before attempting to facilitate such a process.

Learning frameworks considered important for social justice leadership in the SJTLSA items include a variety of strength-based approaches which build on personal experience. Knowledge of transformative learning is valued and includes understanding the importance of a disorienting dilemma to create disequilibrium, critical reflection, identifying a new path and taking action. Research participants confirmed the importance of SJTLSA item 27: “I understand disequilibrium is necessary before transformative learning can occur.” Appreciative inquiry and learning-focused conversations both focus on dialogic approaches to learning that are perceived as useful for supporting adult learning and change. Understanding critical pedagogy supports teacher leaders in identifying and helping others discover the impact of power in learning environments. Once again research participants considered it very important that teacher leaders experience these learning frameworks themselves before being asked to facilitate these processes with others.

The seven types of knowledge articulated were found to be supportive and

enabling of teacher leaders in their work as change agents in schools. The next area that supports teacher leaders in their agency are the skills required to enact leadership.

Skills

Eight skills themes emerged as findings from the first and second phases of analysis of the previously identified data sources. Phase one illuminates findings distilled from analysis of the focus groups, pilot test and the Leadership Skills and School Culture sections, of the SJTLSA. Phase two findings were distilled from the six cohort session summaries, which relate to the skills enabling agency of teacher leaders for social justice. Table 26 indicates data sources for these teacher leadership skills found by triangulating the data sets. It is followed by a detailed and synthesized description of each skills theme.

Table 26

Data Triangulation: Skills Required by Teacher Leaders for Social Justice

Skills Themes	Phase One			Phase Two					
	Focus Groups Pilot Test	SJTLSA Content		Leadership Development Session Summaries					
		LS	SC						
Facilitate safe, collaborative and effective groups	X	X	X		2	3	4	5	6
Facilitate dialogue around difficult and sensitive topics	X	X	X		2	3	4	5	6
Facilitate problem-solving and problem finding conversations	X	X	X	1			4		6
Facilitate positive change with others		X	X	1	2	3	4	5	6
Develop leadership capacity and agency in self and others		X	X	1	2	3	4	5	6
Be a critically reflective practitioner	X	X	X	1	2	3		5	6
Establish, strengthen and sustain collegial relationships		X	X	1	2	3	4	5	6
Maintain and model sustainable well-being		X		1		3		5	

Note: “LS” means Leadership Skills and “SC” means School Culture.

To facilitate safe, collaborative and effective groups, analysis of data indicates that teacher leaders need to be able to maximize the potential of groups by using flexible design and selecting appropriate structures for group work. Focus Group One recommended the addition of: “I manage conflict within a group productively” as item 72 of the SJTLSA, stressing the importance of being able to bring a group back together after disagreements. School cultures which value these teacher leadership skills demonstrate their commitment by having teachers facilitate groups with their peers.

To facilitate dialogue about sensitive or difficult topics, teacher leaders need to be able to lead “fierce” or “crucial” conversations (Patterson et al., 2002; Scott, 2004) which develop and sustain positive relationships between participants. Research participants reported that facilitating dialogue on emotionally laden topics demands that teacher leaders be able to paraphrase accurately and ask good reflective questions. Scholars report that schools which are able to engage in dialogue around areas of conflict or disagreement are able to share and build upon each other’s ideas and resolve rather than avoid difficult topics.

It is believed to be important for teacher leaders to be able to facilitate both problem-solving and problem-finding conversations. Participating teacher leaders’ experiences indicate that both identifying and acknowledging problems can be challenging. Effective teacher leaders encourage their peers to consider issues from a variety of perspectives. Schools that engage in problem-finding as well as problem-solving conversations move away from the tendency to assign blame when results are not as positive as expected, and towards seeking creative realistic solutions: “... we talk about ways to do better next time without assigning blame” (Item 27, SJTLSA).

Learning to facilitate positive change with others is at the heart of teacher leadership. Teacher leaders who “do your thinking and let it radiate” (Carousel Charts, Session One) can help groups adopt and maintain a strength-based, equity-oriented, social justice perspective while they take small manageable steps towards an envisioned change. Focus Group and research participants confirmed item 86: “At our school staff members who raise social justice issues are appreciated” (SJTLSA), as a desirable though infrequent experience in schools. Data from the leadership development sessions indicate that teacher leaders encourage groups to work towards congruence between their beliefs and their actions. This positive change orientation helps create a positive school culture with an asset orientation towards the internal and external school community.

Developing leadership capacity in yourself and others is also one of the fundamental skills of teacher leadership which can manifest in many different ways in a teacher leader’s practice. Common skills practiced by research participants include encouraging, empowering or advocating for others, modeling desirable behaviours and mentoring colleagues and students. Supporting others who take the lead was one of the key skills of SJTLs in the cohort who actively encourage their colleagues to see themselves as change agents. SJTLSA items suggest and participants confirmed that in schools with high leadership capacity, leadership skills are distributed widely amongst the school community and everyone is included in the celebration of shared successes.

SJTLSA items suggest that critically reflective practitioners ask a lot of questions, do their own critical analysis and engage others in critical reflection. This means teacher leaders need basic skills in examining data to see what can be learned and may involve the more structured and thorough process of action research. Self-assessment items and

focus groups indicated that reflective practitioners concerned about social justice question their own personal privilege, pose reflective questions to others and engage in thoughtful decision-making. Schools with reflective practitioners are seen as able to question longstanding practice and engage in frequent cycles of inquiry. These schools use data as an opportunity to reflect on their shared practice and appreciate colleagues who are skilled in asking challenging and thought-provoking questions.

According to research participants, establishing, strengthening and maintaining collegial relationships can be a real challenge for change agents. Initiating and building relationships requires skills in active listening, empathy, looking for commonalities and an attitude of openness. Maintaining positive and collegial relationships, during the change process, requires teacher leaders to model excellent communication skills, solicit ongoing commitment from all participants and facilitate an atmosphere of mutual respect. Schools in which there are strong collegial relationships amongst staff members are able to recognize and appreciate each other's professional skills and also engage in difficult conversations, without destroying relationships.

Research participants have found that teacher leaders for social justice need to be skilled in self-care and be able to model and sustain balance between their professional and personal lives. Leadership development sessions suggest that incorporating a sense of fun into leadership work makes teacher leaders more sustainable in their work and helps them model healthy habits for others. Schools that are committed to sustainable well-being demonstrate those beliefs by developing resiliency in staff and students.

These eight themes reflected in multiple data sets provide a detailed picture of the skills that empower teacher leaders to be critical change agents in schools. The final

category is the dispositions which assist teacher leaders in their work as change agents for social justice.

Dispositions

Eleven disposition themes emerge as findings from the first and second phases of analysis of data from identified sources. Phase one of analysis illuminates findings distilled from analysis of the focus groups, pilot test and the Dispositions and Personal Attributes items of the STJLSA. Phase two of analysis presents findings from the six cohort session summaries, which relate to the dispositions supporting agency of teacher leaders. Each of these is identified in Table 27. Following Table 27 I describe each of these themes in detail by synthesizing what has been learned from all the data sets.

Table 27

Data Triangulation: Dispositions Required by Teacher Leaders for Social Justice

Dispositions Themes	Phase One			Phase Two					
	Focus Groups Pilot Test	SJTLSA Content		Leadership Development Session Summaries					
		D	PA						
Open to learning from others	X	X	X	1			4		6
Collegial ability to build on others' strengths	X	X	X	1		3	4		6
Takes action	X		X	1			4	5	6
Deep conviction to equity	X	X	X	1			4	5	6
Inclusion and safety		X						5	6
Empathic	X	X	X	1	2			5	6
Passionate	X		X	1			4		6
Seeks balance	X		X	1	2		4		
Optimistic	X	X	X	1			4		6
Analytical	X	X	X						6
Clear direction and focus	X	X		1					6

Note: "D" means Dispositions and "PA" means Personal Attributes.

Teacher leaders engaged in social justice work demonstrate a wide range of dispositions which provide focus and direction for their work in schools. The dominant quality displayed by these research participants is a quality of openness. It is understood that to be a leader, a person must be open to learning from and with others. This may present variously as curiosity, a love of lifelong learning or open-mindedness. Open-minded individuals seek first to understand and learn from others by searching for commonalities rather than differences. Being open to others requires a good knowledge of oneself, and a willingness to be flexible and accept feedback.

Teacher leaders strive to develop and maintain strong collegial relationships with their peers. Actively supporting and advocating for their colleagues supports teacher leaders' empowerment. Being optimistic about their colleagues and building on the strengths of others helps build leadership capacity and creates an environment in which all teachers can be leaders. Collaboration and teaming are two ways found to build trusting and collegial relationships that are capable of withstanding disagreement.

Teacher leaders are disposed to perform many roles within schools that contribute to change. Research participants indicated that they work within their sphere of influence to identify and raise issues of equity in service to the school community. Possessing an action orientation, teacher leaders in the study describe each other as risk takers and change agents who raise ethical concerns and choose agency over apathy. They believe their activist orientation leads them to challenge deficit thinking and advocate on behalf of students. These dispositions can strengthen school culture.

As advocates for equity, participants in the focus groups and the TLSJ cohort reported being motivated to act as a result of deeply rooted commitments to the principles

of social justice. Some of these convictions have developed from personal or vicarious experience of injustice or inequity. Principles valued by research participants include environmental sustainability, and the right of all people to access, opportunity and voice. In coming to value equity over equality, participating change agents have come to understand that accepting the implications of their beliefs in social justice may require a reduction of personal privilege. They strive to act with integrity and in congruence with their beliefs and therefore supported the inclusion of SJTLSA item 36: “I adjust my actions to reflect my social justice beliefs”.

One particularly strong belief of social justice change agents, including focus group participants, was inclusion with dignity. This concept includes everyone’s right to attend the neighbourhood school, access a personally challenging academic program and be a valued community member. One fundamental indicator of belonging and dignity according to research participants is feeling safe within a school and the larger community. Another is having high expectations for all students regardless of personal background or socio-economic status. According to focus group one this may include working to create and preserve options for students, such as access to university preparatory courses.

Teacher leaders seem to be empathic by nature. These individuals are able to put themselves in someone else’s shoes and understand different perspectives. There is often a tendency to identify closely with those who experience inequities or are otherwise marginalized. Empathic teacher leaders are patient, calm and respectful. They demonstrate active listening skills in multiple contexts.

Closely correlated with the strong tendency to be empathic, is the likelihood of TLSJs being very passionate about their beliefs. Strongly motivated to create change, teacher leaders in the study described each other as bold and inspiring individuals who are highly innovative. By being passionate about their goals and highly engaged in their work, teacher leaders provide positive role models for their colleagues and students. To be effective, teacher leaders find they need to be assertive not aggressive and persuasive rather than didactic. They prefer to be pro-active rather than reactive and often take initiative.

As positive role models in their schools, cohort participants reported that they struggle to model balance between their professional and personal lives. This focus on wellness is an essential challenge to overcome as it correlates closely with the sustainability of their work and personal well-being. As emergent and organic change agents, TLSJs can find themselves in a vulnerable position as a result of the multiple commitments which emerge from their personal convictions and desire to make a difference. Participants in Focus Group One spoke openly about the names they had been called by colleagues including “Jesus” and “do-gooder” and how they had “experienced the terror and isolation of standing up for something I believe in” and had “been ostracized” by their colleagues. One participant reflected on the negative feedback she received when supporting LGBTQ students: “You want to be careful when you are pushing for change that you are not displacing others. Creating safe places for students can displace other staff members and create tension” (Participant M, Session Two). Research participants reported that advocating for social justice and being a risk-taker and change agent within a school, leaves them vulnerable to emotional exhaustion and

being ostracized by their peers: “Sometimes our fight makes us targets” (Participant S Journal, Session One). “The resistance is hard too. We are colleagues, you feel like you’re on this roller coaster all the time” (Participant S, Session One). Their commitment to creating sustainable change consequently includes paying attention to personal health and well-being so they are able to remain engaged and passionate throughout their careers:

I feel myself being too burdened by other colleagues’ struggles... they are my friends and they are struggling personally and professionally. I seem to have lost my strong shell that allowed me to listen and support without feeling weighed down and depressed. I have decided that I need to go into a full out “lock down” mode and build up my personal reserves for a while. My mind is saying this is “mean” but my body and soul are crying out for the weight to be lifted.

(Participant T, Session Four Journal)

Another protective disposition for TLSJs is their optimism. Research participants reported that their belief in the potential for change, leads them to adopt a hopeful and invitational stance and strength-based rather than deficit approaches. SJTLA item 12 states: “I believe teachers are capable of improving student success through deliberate thoughtful action.” Research participants concurred, that teachers who do so are able to contribute to student success and sustain continuous improvement in schools. A common disposition demonstrated by teacher leaders and identified by focus group one is to recognize and build on the strengths of others.

In addition to being optimistic, teacher leaders for social justice tend to be very analytical. The ability to apply a critical lens to individual and collective practice is an

essential step in the change process. Focus group participants suggested that indicators of an analytical orientation are the ability to question longstanding practice and the underlying assumptions in curriculum documents. Another critical disposition identified for teacher leaders is to recognize that schools reflect and reproduce the power structures and inequities found in society. The tendency of TLSJs to be reflective and thoughtful contributes to them acquiring wisdom which is appreciated and valued by others.

What allows all of the above dispositions to be harnessed by participating teacher leaders is their tendency to be very clear and focused in their goals. “Agency should be a goal of education... to help foster a sense of agency in a child’s life...I need you to advocate for your own needs with your next teachers” (Participant K, Session Five). This sense of direction rooted in clear beliefs is a common disposition of teacher leaders that contributes to their effectiveness. They work hard to determine where it is most effective to focus their energy.

In summary, the knowledge, skills and dispositions that empower teacher leaders settle in a few key areas. The results of this study suggest that teacher leaders need knowledge of social justice and leadership, of different frameworks for creating change and learning, and how to facilitate collaborative and collegial groups. They need to be skilled at knowing how to facilitate groups, dialogue, and problem-based conversations and how to use critical reflection to create positive change. Change agents also need skills to develop strong relationships with their peers and develop leadership capacity in others. Teacher leaders tend to be empathic, passionate, optimistic and analytical. They hold deep convictions around equity, safety and inclusion and are open to learning from others, building on their strengths, and learning to find balance so their work can be

sustainable. Many of these central ideas surfaced during leadership development sessions. What has been learned from thematic analysis of the leadership development sessions is presented in the next section titled theme one: change agency.

Change Agency

A secondary data source that helped to answer the first research question was the themes generated over the course of the six cohort sessions. These themes synthesize session summaries. Each session summary captured what was learned from analysis of the learning activities and data sources pertaining to a particular session. The themes compliment findings presented in the first section but are more detailed. Findings are discussed in relation to five sub-themes discovered: Strategies for TLSJs, Beliefs and Values of TLSJs, Relationships During Change, Context of Change and Principles of Practice, in that order.

Strategies for teacher leaders for social justice. Teacher leaders in the research cohort utilized two different groups of strategies. The first is action strategies and the second is sustainability strategies.

Action strategies. To have agency is to believe you have the capacity to contribute to positive change in your local environment. Examples of agency demonstrated by cohort members include modeling, advocacy, risk-taking, mentoring and supporting colleagues. To engage others in change processes cohort members try to be empathetic, inviting, supportive and encouraging. Developing leadership capacity among teachers requires quelling negative talk, allowing time, listening without judging, recognizing experience and making links between teacher leadership and improved teaching. Cohort members value reciprocity within shared leadership and understand it is

important to acknowledge the experience of senior staff members before expecting them to change. Cohort members believe reluctant colleagues might increase their curiosity about entrenched school practices if they had opportunities to examine data, explore social justice as pedagogy and learn the differences between equality and equity. For inclusion to be successful, cohort members understand that special education teachers need allies on staff to help move an inclusion agenda forward.

Sustainability strategies. As they struggle to balance multiple competing roles and responsibilities in their professional and personal lives, teacher leaders experience a broad range of emotions and are constantly evaluating and adjusting priorities. It is a particular struggle to remain resilient when facing multiple challenges simultaneously. To be effective agents of change, cohort members are aware of the need to engage in self-care and find balance between their work and personal lives. Strategies to overcome roadblocks include forging authentic relationships, restructuring, and looking at the big picture while valuing incremental change. When they find it difficult to be optimistic, cohort members regroup by actively looking for student strengths and consciously reasserting a strength-based approach in their work. Members of the group access a number of supports in their leadership work including the staff and resources of community organizations, their fellow educators, community members and published resources. One struggle research participants have is worrying whether anyone will step up to fill the void if they step back from their previous responsibilities. Cohort members have found that if change is driven by personality, rather than on developing shared leadership capacity among staff and students, it is more vulnerable and apt to disappear when one person leaves.

Committed teacher leaders consider their work successful if colleagues take more ownership, show less resistance, take more risks and become more engaged, committed and empowered, as a result of their actions. In their work with students, cohort members feel successful when they see students can recognize an inequity, initiate a response to address the issue and view themselves as agents of change. When these changes are observed, teacher leaders know they have helped to develop the leadership capacity in their schools and therefore increased the likelihood of authentic change in the future. Conversation amongst the cohort raised the question of why there are so many more females involved in social justice work in schools than males. The notion that gender is an issue in social justice work that would merit further investigation is supported by the composition of the cohort and cohort members' experiences in schools.

Beliefs and values of teacher leaders for social justice. Cohort members value acceptance, understanding, and inclusion. They believe hope, opportunity, passion, and strength-based approaches are important tools in their work for social justice. Having a clear vision of what they want to accomplish helps leaders set direction while working for change. Cohort members believe in celebrating and building upon success. A key motivator in this work is seeing agency, leadership capacity and hope develop in students. A pre-requisite to understanding equity is the ability to empathize with others, particularly those with fewer privileges in society, and to understand the differences between equality and equity. To have empathy is to be able to appreciate and understand the feelings of another individual as if you were "in their shoes". Empathy requires taking time to listen and understand another person's perspective. Empathy is required to be able to form non-judgmental relationships with others. Cohort members seem to feel people

need to have experienced empathy in their lives to be able to demonstrate it to others. Teacher leaders in the cohort share a passion for equity in schools. The specific marginalized populations for which group members are advocates include Aboriginal students, students with special learning needs, students considered “at-risk” for failure, students living in poverty, students of diverse cultures, student affected by war, and sexual and gender minority youth and their families.

Collegiality during change. Positive and collegial relationships with colleagues, students, communities and school administration are the foundation of teacher leadership. To foster and maintain positive relationships, cohort members listen and engage their colleagues in conversation, trying not to pass judgment. The teacher leaders in the cohort value their collegial relationships and opportunities to learn with and from others. Yet they often find themselves challenged to maintain positive relationships, as their work for social justice can set them up as a target and leave them somewhat isolated from their peers. Participant R remarked on this experience: “To ask hard questions you are putting up for critique what they are doing, and what you are doing... Because you raise issues or do things differently you get attacks” (Participant R, Session One). Research participants were very aware such perceptions can negatively impact their agency as teacher leaders: “I see that if I have a negative relationship with my peers I won’t be able to be a change agent” (Participant R, Session Three).

Consistency. Teacher leaders in the cohort struggle to demonstrate consistency between beliefs, values and actions in their professional and personal lives. Acting on knowledge and demonstrating conscious and mindful behaviours can be an overwhelming challenge for cohort members. Nevertheless, they want colleagues and

administrators to also strive to be consistent, between the values they espouse, the decisions they make and the actions they take. Teacher leaders expect the schools and divisions where they work to demonstrate consistency by acting on their policies and ensuring their actions are congruent. This is of particular importance when lobbying for policy changes consumes the valuable time and energy of educators committed to social justice.

Frameworks for practice. Both general and specific frameworks support teacher leaders in creating change. General frameworks include the impact of the school context and the role of teacher leaders in contributing to change. Specific frameworks support teacher leaders to determine the direction and focus of their change making efforts in pursuit of social justice.

General frameworks. School context refers to the current environment(s) in which teacher leaders are working for change. Individuals struggle to determine priorities which will have the most impact in their schools and communities. Teacher leaders work towards creating environments that are safe for children and adults. Effective leaders are able to accept initiative and leadership from others and support them through collaborative teamwork.

Reflecting on the culture of the school in which a person works can be either a discouraging or encouraging process depending on what is revealed through the process. Many cohort members have strong emotional responses when asked to reflect on the climates in their particular schools. Participants who work in schools where current practice is being challenged indicate this can be a source of tension on the staff. Many teacher leaders are trying to find effective ways to support innovative risk-takers in their

schools. Cohort members value administrators who model the changes they seek by “walking the talk” and providing both pressure and support. Principals who delegate responsibilities and maintain control are seen as countering shared leadership, while those who provide pressure and support are seen as supportive of teacher leadership. The difficulty of trying to lead for social justice in an atmosphere where leadership is not distributed broadly is understood to be particularly challenging. When asked to compare teacher leaders to irises in a synectics activity, cohort members identified many key principles of teacher leadership for social justice:

Teacher leaders for social justice are like irises because.... Irises are beautiful, bold and colourful harbingers of spring, the season of change, new life and new ideas. Their fragile and brief existence implies vulnerability, yet their roots go deep to find sustenance and emerge when conditions are right. Irises find strength with others and contribute and are valuable to their community throughout their life cycle. Irises, like social justice leaders, are naturally occurring, tenacious and organic survivors in all kinds of conditions. (Session Four Summary, January 10, 2013, p. 1)

Specific frameworks. Frameworks introduced to the cohort provided participants with ways to organize their thinking about complex topics. The Social Justice Lens developed by the British Columbia Teachers’ Federation (BCTF) identifies four aspects of social justice leadership: access, agency, advocacy and solidarity in action. Using the Social Justice Lens template helped cohort members identify and work through three contrasting topics: fair trade, eliminating barriers to participation in meetings, and inclusion. One group used the SJ Lens to focus their work, share their strategies and

articulate key questions to consider; a second group used the lens to provoke and guide dialogue around a topic of mutual interest and concern; the third group focused on clarifying the issue and identifying strategies they have found to be effective through personal experience. Participants said the template helped them to formulate their thoughts, realize how many issues are shared by different school divisions and think about the need for school-wide change. It also made visible the challenges of working for social justice around particular topics or in specific contexts. Their completed templates became examples of theory-in-action (Argyris & Schön, 1974).

Johari's window, developed by Joseph Luft and Harrington Ingham (1955), is designed to help people understand themselves and their relationships with others. Cohort members used the template to sort feedback they received from school-based and cohort colleagues into the category of known and unknown. Participants indicated the process of sorting the feedback was very revealing. There was an overall balance between the number of known and unknown attributes identified overall, which indicates that participants gained some new insights as a result of the feedback processes used. These personal insights help them reflect on their leadership and strengths and identify areas for further growth.

Other frameworks valued by participants include shared leadership capacity and teacher leadership frameworks (Lambert, 2003b) and learning about the principles and processes of effective groups (Lipton & Wellman, 2011b). Social justice frameworks (BCTF.ca; Kugler & West-Burns, 2010) were also considered important along with the related concept of equity in schools (Ross & Berger, 2009). The third type of framework considered valuable were those associated with dialogic leadership (Brown, 2004;

Shields, 2004) and learning the theory behind fierce and crucial conversations (Patterson et al., 2002; Scott, 2004). The fourth group of topics concerned the change process including roadblocks which can arise when engaged in creating change (Fullan, 2008; Participant R, October 25, 2013; Smith, 2011). The use of general and specific frameworks helped participants set personal targets, organize their thoughts and identify next steps likely to contribute to change.

In this chapter I presented findings related to the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools. I have done so first by identifying answers to each aspect of the research question using relevant data from the focus groups and pilot test, SJTLA content and cohort session summaries. The second section of the chapter presented more detailed interpretations of the findings as experienced by cohort participants and resulting in themes generated through the process described in Chapter Six.

Looking across multiple data sets revealed a number of recurring themes. Inferred from these data is that teacher leaders demonstrate optimism and openness; have passion, conviction and agency; need skills in collaboration and facilitation of groups; understand how to provide leadership while sustaining collegial relationships; make use of critical reflection and frameworks as tools; and are in constant search for balance and sustainability. In the next section I bring together the findings shared throughout this chapter through graphic representations.

Conceptual Model for Question One

The following three figures synthesize the findings for research question one. In Figure 32 the three interlocking circles contain the knowledge, skills and dispositions

most likely to empower teacher leaders to be critical change agents in schools. Each circle contains the significant findings from the analysis of data focused on each dimension of the question. The circles overlap to show the inter-relationship between the areas of knowledge, skills and dispositions.

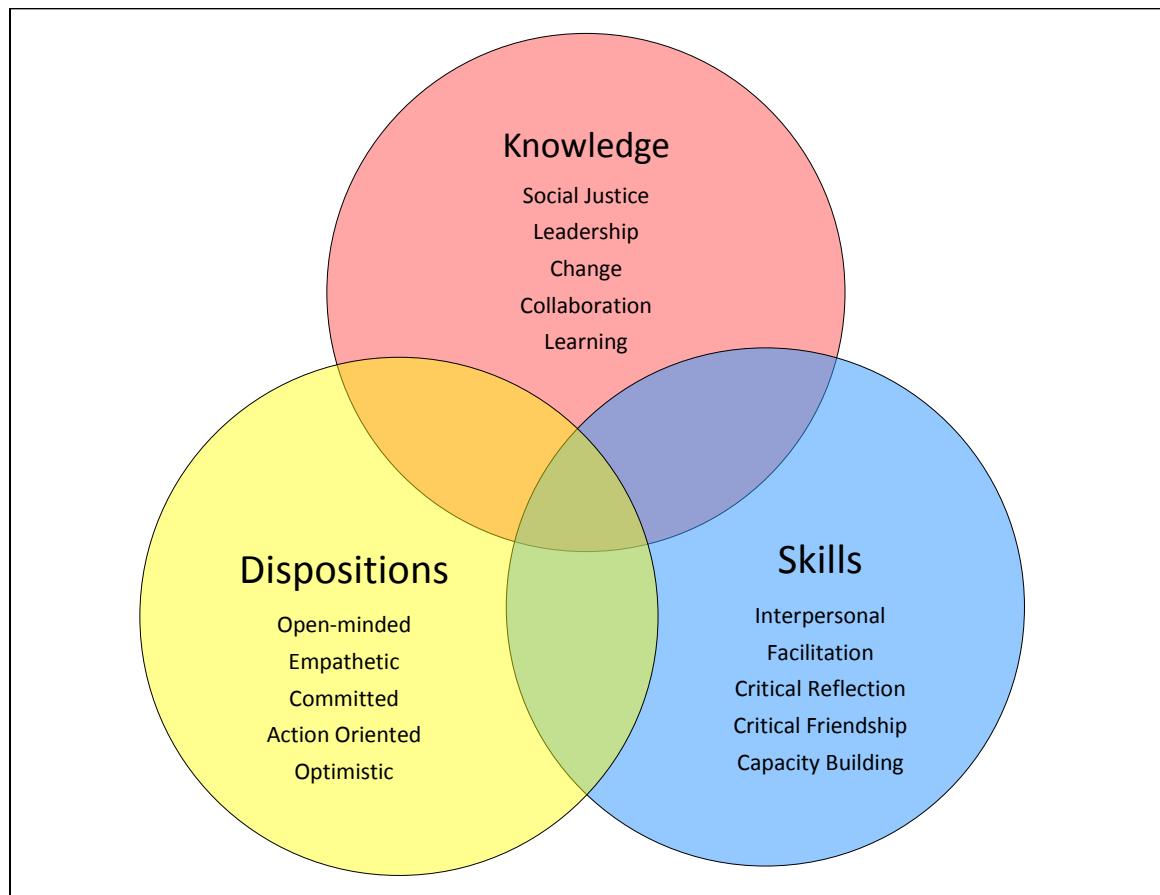


Figure 32. Knowledge, skills, dispositions of teacher leaders for social justice.

In Figure 33 the varied ways research participants found to demonstrate agency are represented in a series of ovals matching the theme identified earlier as change agency. The beliefs demonstrated most often in the literature and by research participants in both phases of the study are in inclusion, equity, empathy and growth of themselves and others. The strategies employed by teacher leaders in the study include strategies for action, strategies for sustainability and strategies for enacting teacher leadership.

Establishing and maintaining strong collegial relationships was an ongoing struggle for research participants as their work frequently led to resistance from their peers.

Relationship-building skills most valued by participants in the cohort and focus groups include being non-judgemental, using active listening skills and preserving relationships during challenging and ongoing conversations. The frameworks discussed as relevant for teacher leaders in the study include both general “big idea” concepts and specific frameworks more closely associated with leadership for social justice.

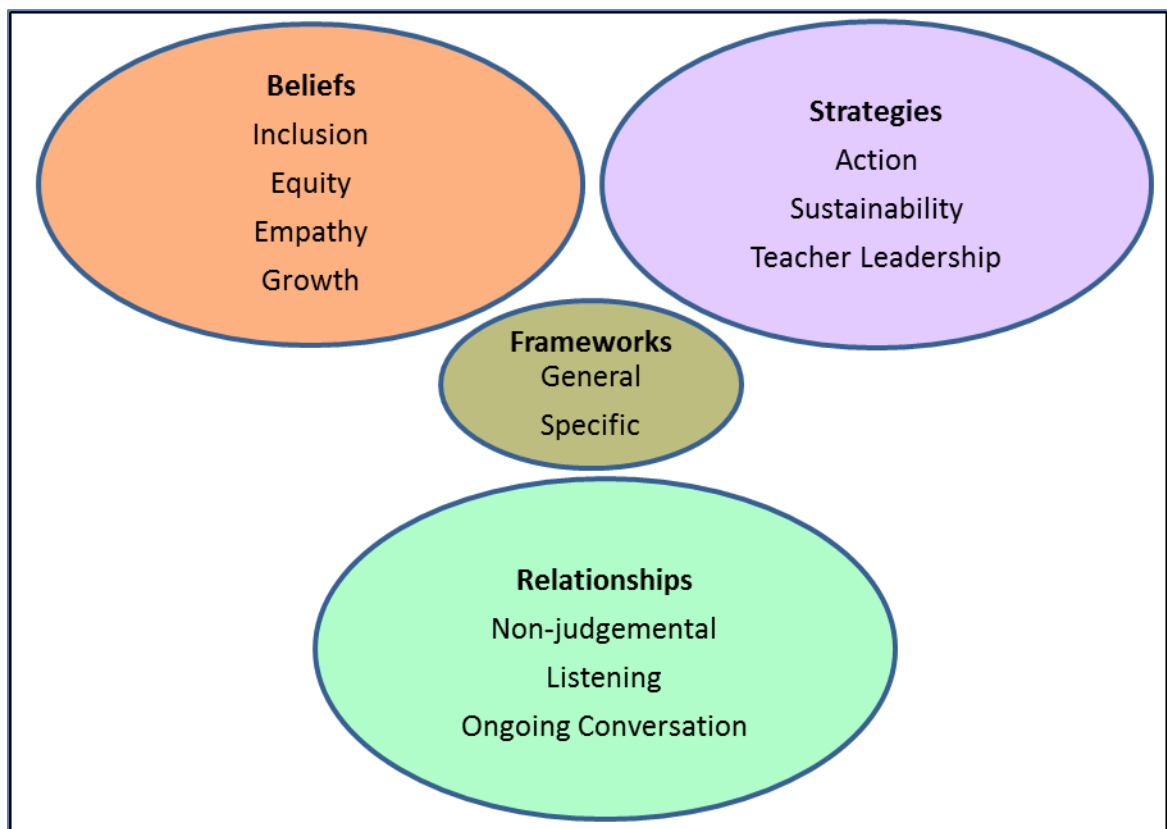


Figure 33. Agency for social justice as demonstrated by participating teacher leaders.

In Figure 34 these two models are combined. The three interlocking circles are as originally presented. The secondary colour areas where the circles overlap represent the agency demonstrated by teacher leaders in the cohort. Only the agency headings are provided to avoid clutter and their location is significant. The teacher leaders’ beliefs

have developed from both their knowledge and dispositions. The strategies they implement rely on both their knowledge and skill to be effective. Strong collegial relationships build on personal dispositions and require specific communication skills to be sustainable. The core of the model is the frameworks teacher leaders use to guide their practice. These frameworks assist teacher leaders to mobilize their knowledge, skills and dispositions through agency strategies to become catalysts for change.

Figure 34 is defined by outside borders and the space within the frame is labelled the context of change. This context describes the diverse environments, not necessarily schools, in which teacher leaders demonstrate agency and create change. Cohort members work to create change within their teacher associations, professional organizations, families and local communities in addition to the schools and divisions in which they teach. Acknowledging that these contexts are perpetually in a state of change recognizes the complex dance required of teacher leaders to offer leadership in constantly changing and dynamic environments.

Summary of Chapter Seven

In this chapter I described the knowledge, skills, dispositions and agency demonstrated by teacher leaders for social justice. I concluded the chapter by proposing my findings as a theoretical construct. This theory-in-context can be considered reflective of the specific contexts in which it was derived, including the tool development and leadership development session phases of the study (Stringer, 2013). In the next chapter I focus on determining the specific elements incorporated into the leadership development sessions which assisted teacher leaders to acquire the knowledge, skills and dispositions to serve as change agents in schools.

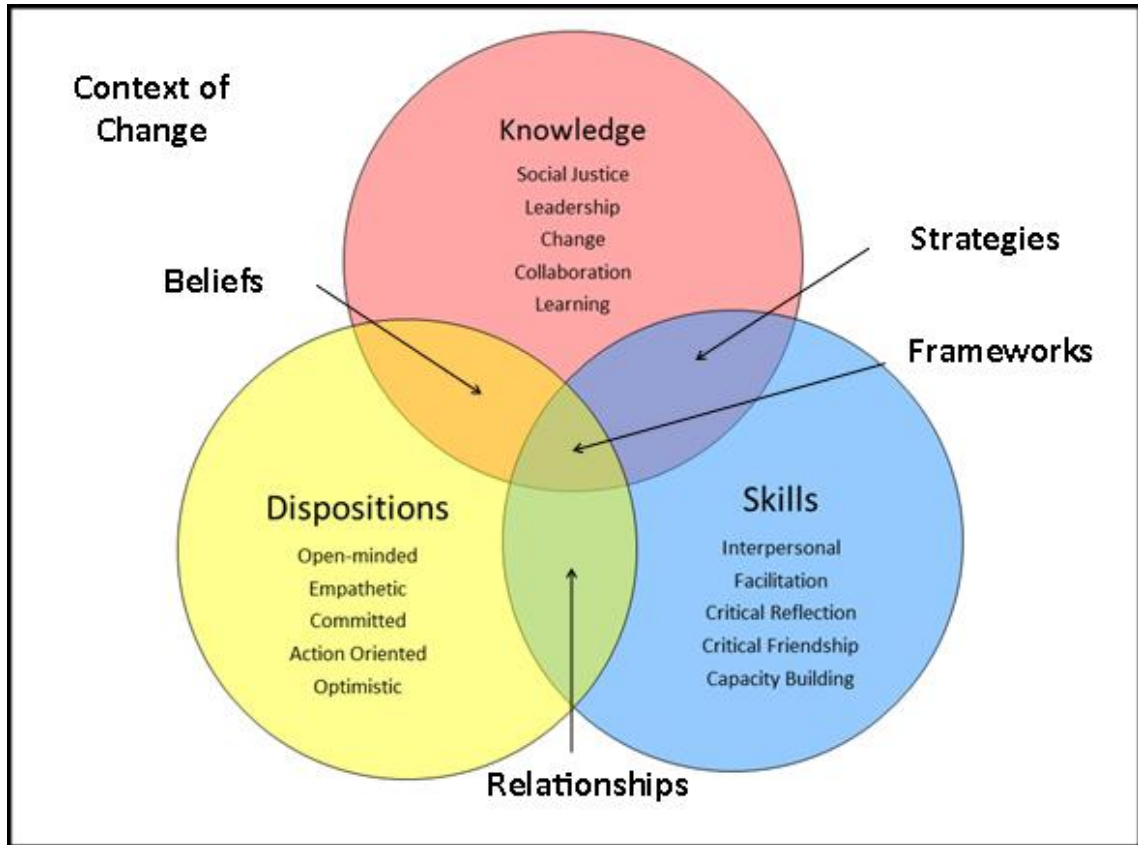


Figure 34. Theoretical construct of the knowledge, skills, dispositions and agency of teacher leaders for social justice.

Chapter Eight: Elements of the Leadership Development Model

Chapter Eight Overview

The second research question asks “In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools?” In this chapter, detailed findings are presented in response to research question two that have emerged from a cross examination of the multiple data sources shown in Table 28. The first step in answering the second research question is to identify the specific elements of the leadership development model. The elements of the leadership development model (Figure 35) formed the core structure of multiple leadership development sessions. Action research and learning-focused conversations also occurred between sessions.



Figure 35. Elements of the leadership development model.

Table 28

Data Forms and Sources by Session for Research Question Two

Data Forms	Data Sources by Session						
	S1-S6	1	2	3	4	5	6
Observations	Video and Audiotaped sessions Researcher Reflections Field Notes						
Interviews	Participant Reflections Learning Focused Conversations (video S1, audio S1-S6)		Conversations with Critical Friends	Conversations with Critical Friends			Self-Assessment Reflections (SARs)
Artifacts	Researcher: <ul style="list-style-type: none"> • Facilitation Guide • Researcher Checklists • LFC Questions • Researcher Journal 						
	Prepared Session Materials: <ul style="list-style-type: none"> • Agendas • Logic Models • Action Research Cycles • Themes 	Design Frame Conceptual Model Carousel Chart Questions	Lambert Article	Strengths and Stretches	3 Articles Fierce Conversation handouts	Role play Scenarios Johari's Window SJ Lens Template	Carousel Chart Questions
	Materials collected during sessions	Carousel Chart Responses		Image Theatre Handout Group Profile	Article Presentation Charts		Carousel Chart Responses
	Participants: <ul style="list-style-type: none"> • Participant journals • Participant Action Research Cycles • Emails 	SJTLSA's	Theme Feedback	Theme Feedback Peer Reflections (SJTLPRs) Strengths and Stretches	Theme Feedback Peer Reflections	SJTLPRs Valentines Johari's Window completed SJ Lens completed	SJTLSAs

Note: Data sources informing findings for research question two are in bold blue font.

The second step is to assess the impact of each element. My assessment of the impact of each element is included at the end of each of the seven sections. Following the description and analysis of the contributions of each element in the leadership development model, I present findings related to adult learning emerging from analysis of cohort session summaries. I conclude the chapter by synthesizing the findings into the conceptual model for research question two.

The seven elements of the leadership development model do not require a particular order or sequence. Critical reflection is at the centre of the figure as it is the underlying intention of each of the other elements. To provide an overview of each element I will begin with participant journals, as reflective writing was often how we began sessions.

Element One, directed journal writing was a significant part of each leadership development session. Participants wrote in their journals during the sessions in response to verbal prompts. Journal writing was used for reflection, problem finding, brainstorming and gathering thoughts before and after dialogue or experiential learning.

Element Two, action research was a job-embedded strategy which allowed participants to apply what they were learning about leadership to real-life contexts. During sessions they created action research cycles to summarize and guide their action research projects. Between sessions they acted on their plans and gathered data to analyze their practice.

Element Three, learning-focused conversations took place between the researcher and participants on location in their schools. The intent of the learning-focused

conversations was to strengthen their ability to reflect critically on practice, most specifically on their action research.

Element Four, dialogue was an important feature of the cohort sessions. In each session there were opportunities for partner, small group and large group dialogue on a variety of topics. Dialogue was one of the important ways in which cohort members shared experiences, negotiated meaning and worked through roadblocks. Building on shared experience, partner dialogue in the latter sessions followed the more structured format of learning-focused conversations.

Element Five, formal engagement in self-assessment occurred during Sessions One and Six when participants were asked to complete the Social Justice Teacher Leadership Self-Assessment (SJTLSA), the ten page tool, developed for this purpose in the first phase of the study. Informal self-assessment happened throughout leadership development sessions as a result of critical reflection.

Element Six, peer feedback was solicited formally on two separate occasions and informally throughout the leadership development sessions. Informal opportunities for peer feedback also occurred during dialogue sessions following specific learning experiences facilitated by cohort members, during discussion of participant feedback on the logic model and during sharing circles.

Element Seven, critical reflection was a cornerstone of the leadership development model. It is distinct from the other elements in that it is embedded within all the other activities. Critical reflection was facilitated during cohort sessions through journal writing, dialogue and action research cycles. Peer reflections and self-assessment provided content for critical reflection and learning-focused conversations provided a

process by which critical reflection could occur. Critical reflection was also deepened through engagement with critical content in readings, videos and presentations by members of the cohort. What follows is a more detailed description of each element of the leadership development model and its impact, beginning with participant journals.

Element One. Participant Journals

Participants were provided with a journal for use during leadership development sessions. Journals were used in every session and fulfilled eight different functions: unloading, activating prior knowledge, increasing safety, facilitating transitions, critical thinking and synthesis, allowing for differentiation and preparing participants to engage in critical reflection.

Early in the day, journals were used to help participants “unload” the information they were storing in their short term memory. When I gave people time to “download” their thoughts and feelings, in particular about their action research, I felt the level of tension in the room decrease. A sense of calm would come over the group and it felt like people shifted into the right frame of mind to handle challenging content and critical thinking. One participant described the process of journal writing as follows: “Distilling: Percolating occurs during this time. Down shifting and Upshifting. The quiet is a birthing place for both reflection and action” (Participant R, Validation Session Feedback). I gained personal insight into this phenomenon following Session Four. After analyzing participants’ journal responses, I wrote in my researcher’s reflection:

I am reminded once again very forcefully of the power and importance of giving people time to write when they come to the sessions. Our lives are far too busy to just jump into difficult work. The writing activates prior

knowledge and brings to the forefront our thoughts about our work....
reminding them of all the little steps they have taken in their work.

(Researcher's Reflection, January 24, 2013, p. 1)

I was able to understand the “unloading” function of journals in Session Four. I felt scattered and unfocused early in the day and noticed that writing cleared my own head, built my confidence and prepared me to focus for the rest of the day. I recognized this as a time in which I felt empathy for my participants' possible emotional states at the start of each session.

A second related function of the journals was to activate prior knowledge and experience. Providing time for participants to write down all recent activities related to their action research, prepared them to enter into critical reflection and learning. Without bringing those actions to the forefront, subsequent activities would have been less effective in promoting critical thinking and reflection, as energy and focus would be directed towards recall, a much more superficial type of thinking.

Another function of the journals was to increase the level of safety in group discussions. Providing group members a chance to jot down their thoughts before dialogue, increases the likelihood that everyone will contribute to the conversation, increases the diversity of responses, and increases the level of engagement in the conversation (Lipton & Wellman, 2011b, p. 10).

The fourth function of the journals was to simply serve as a mnemonic device. Participants often recorded quotes, references, contacts and to do lists in their journals, that were stimulated by session contents and related to their leadership responsibilities. One limitation of this function was that participants did not have access to their journals

between sessions so could not make use of their written notes between sessions. This was a source of frustration for me, but participants insisted that the journals not be allowed to go home with them. They feared if they were allowed to take the journals home they would be lost or forgotten and therefore not be available for subsequent sessions. This suggests that it was the act of writing in their journals, not re-reading what they have written, that was valued by participants.

A fifth way in which journals functioned was to facilitate transitions. I would often schedule journal writing time either before or after particularly intense activities, to ensure participants would have sufficient emotional energy available to allow them to fully engage in all tasks. Journal writing provided a period of quiet after a particularly loud learning experience and at times some much needed “down time”.

A critical function of the journals was to solicit and gather critical thinking by participants. Cohort members were asked to reflect on experiences, processes and artifacts. These periods of reflection contributed to individual skill development and meta-cognition and contributed to the critical nature of the research. For one participant this opportunity for reflection was valuable: “Journaling also allows for the component of leadership that requires reflection. Try – observe – reflect – try – observe – etc. Reflection piece is often missing” (Participant R, Written Feedback, May 30, 2013)

Following intense, prolonged or particularly complex activities, journals were used to provide time for synthesis. Synthesis increases retention, application and transfer (Lipton & Wellman, 2011a). Synthesis writing helped me gauge what was being internalized by individual participants.

Finally, journals provided space and latitude for differentiation and individual insights. Space and time provided for journal writing facilitated members in being self-directed, reflexive and increasingly more self-aware. One participant described it this way: “As an English teacher, I know the importance of journaling, but rarely engage in it myself. Any time I do, I am reminded of its profound impact” (Participant T, Written Feedback, May 30, 2013).

Journal writing helped cohort members develop agency by preparing individuals emotionally, practically and cognitively to engage fully in critical reflection. Journaling deepened members’ understanding by offering space and time in which to process ideas and experiences. Finally, the use of journals increased the likelihood of retention and follow through by offering opportunities for synthesis and consolidation of learning.

Impact of journaling on participants. Journaling helped cohort members in four different ways to acquire the knowledge, skills and dispositions necessary to serve as change agents. It provided an outlet for emotions triggered by leadership and cohort activities or conversations, as well as a private space in which individual thoughts could be recorded. Journaling also provided space and focus for critical reflection, when given direction by the facilitator. Finally, it served as a mnemonic device allowing members to record ideas for follow-up after sessions.

As an emotional outlet, journals allowed cohort members to download experiences and get them off their mind. This process brought about a sense of calm and created energy for further interactions. Examples of how individuals recorded their personal doubts and fears about their leadership work are found in the journals: “Still struggling with my self-concept: seeing myself as someone who can make a change or

someone who can help change old mindsets” (Participant L, Journal Session Four).

Another example: “I am feeling downtrodden ... Giving up is not part of my identity or past experience as a teacher or teacher leader. What is happening?” (Participant K, Session Three Journal). They also wrote about internal and external challenges or roadblocks they were facing. After they finished writing, participants seemed happier and more relaxed. Even when I would discover later that an individual had been writing about disappointment in their work, doing so still seemed to help them feel calmer and prepare for further thinking.

The private nature of the journals was very important. It was because they were private that members were able to record their emotions, negative thoughts or self-doubt: “... it was “private” – not always shared or selectively shared – “safety” is key and we could mention things we weren’t prepared to deal with in group” (Participant M, Validation Session Feedback). I benefited from reading their personal reflections as well as their analysis of data and viewpoints on a number of different topics. I believe that I may not have had opportunity to hear about positive offshoots of individual leadership initiatives if I had not provided the option of recording these in a private manner.

Journals provided both the space and the process for critical reflection. Cohort members prepared for, participated in and reflected upon various learning activities through their journals. They often wrote before or after learning-focused conversations or work on their action research cycles, as a way to “till the soil” in anticipation of further dialogue. A significant portion of the journal responses concerned participants’ action research projects. Through journal writing they were able to find and revise their focus, record their actions, and document the slow and steady growth and small shifts they

observed in their work with colleagues. Journals became a place to reflect on critical incidents, develop plans and articulate decisions that later became part of their more formal action research cycles.

Finally, journals not only functioned as mnemonic devices but were valued for that role. At times I would find “to do” lists sparked by cohort activities or questions intended to provoke further personal reflection. Journals particularly supported those learners who like to be active and write, draw or record ideas during cohort sessions. As indicated, one of the main uses of the journals was to have participants reflect on their action research cycles.

Element Two. Participant Action Research Cycles

Participants in the TLSJ Cohort were introduced to the process of action research in Session One and to the specific template being used during Session Two. Each participant was asked to identify an action research focus related to leadership for social justice involving their colleagues. Between sessions they were asked to enact their action research plan and collect data. During sessions they were given time to record their progress. One participant commented on the value of the participant action research cycles as a change strategy: “I really liked this action research cycle. I feel that it is a good way to keep track of changes that you want to try and implement in the school” (Participant L, Validation Session Feedback).

During my planning phase, I realized that my researcher cycles would be “in progress” and partially complete at the time of the leadership development sessions. What I didn’t realize was that participants would also likely have “cycles in progress”. It was not until the second session that I realized I should not be collecting participants’

action research cycles until they were finished with them; this meant that I would not necessarily be collecting one from each participant each session. Once I realized my oversight, it seemed obvious that cohort members needed to have their written cycles with them as a support to be able to follow through on their action research plans. It also was evidence to me that their cycles were very authentic. When asked during the Validation Session, the majority of participants indicated that taking their completed action research cycles home with them immediately would also have been helpful (Questions for Cohort, May 30, 2013).

Submission of action research cycles. Submitting action research cycles for the reasons outlined above was requested, but not required during each cohort session. As a result, different numbers of participants submitted cycles per session and at times some participants submitted more than one cycle per session. As can be seen on Table 29, there were three different stages of cycles that were submitted. An “in progress” cycle (i) usually had three of the four sections completed but the participant was waiting to complete the findings section until after data had been collected and the analysis was complete. When these “in progress” cycles were submitted a second time, fully complete, they were called revised (r) cycles. The third type of cycle, with no particular identification on the chart, was submitted once when completed.

Table 29

Action Research Cycle Submissions by Participant and Session

Name	Session 2	Session 3	Session 4	Session 5	Session 6	Submitted	Cycles
G			1, 2	3, 4, 5i	5r	6	5
J		1i		2	3	3	3
K			1	2i	3i	3	3

(Table Continues)

(Table Continued)

L		1	2i	2r	3	4	3
M	1	2i	2r			3	2
N		1i	2		3	3	3
R			1		2i	2	2
S		1	2i	2r, 3i	3r, 4i	6	4
T	1	2	3i	3r	4	5	4
Cycles submitted	2	6	9	9	9	35	29
People who submitted	2	5	8	6	8		

Note: “I” means in progress and “r” means revised.

Also visible in Table 29 is the range in the number of cycles submitted per participant (from two to five), the number of different participants submitting AR work per session (from two to eight) and the overall number of submissions per session (from two to nine). One individual participant preferred to revise an ongoing action research cycle rather than start new cycles (Written feedback, May 30, 2013). Looking across horizontally by participant Table 30 indicates there were six cycles submitted initially as “in progress” that subsequently were revised and completed. Three cycles (J1i, K2i & N1i) which were submitted as “in progress” were not completed. These incompletes reflect a change of focus or strategy rather than a reluctance to see a project through to completion. Frequent reference is made in the literature to discontinuing an action research project midway through a cycle (Marshall & Rossman, 2011). This option to discontinue is perceived by some to be an advantage of action research, in that researchers are not required to continue along a path they find unproductive.

The upper half of Table 30 summarizes the submissions and how many were “in progress” or completed per cycle. While there were a total of 35 submissions, only 23 of those represented completed cycles, 17 submitted complete and six submitted as revised.

Of the 12 “in progress” cycles submitted, six were later submitted as revised, three were abandoned and three were still “in progress” on the day of our sixth and final session.

Table 30

Participant Action Research Cycle Submissions by Session

Submissions	Sessions (S)					Total
	S2	S3	S4	S5	S6	
Total Submissions	2	6	9	9	9	35
In Progress Submissions	0	3	3	3	3	12
Revised Submissions	0	0	1	3	2	6
Completed Submissions	2	3	5	3	4	17
Completed Cycles	2	3	6	6	6	23
Discontinued Cycles	0	2	1	0	0	3
Components	Sessions (S)					
	S1	S2	S3	S4	S5	S6
Clear Question	2	3	6	6	8	25
Strategies	2	6	9	9	9	35
Data Collection Indicated	1	5	5	8	8	27
<i>Observation</i>	1	5	5	8	6	25
<i>Interview</i>	1	1	5	8	7	22
<i>Artifacts</i>	0	4	5	8	6	23
Findings	2 (0i)	3 (3i)	6 (3i)	6 (3i)	6 (3i)	23 (12i)

The lower half of Table 30 breaks down the submissions identified earlier into their component parts. The numbers represent the number of cycles submitted during each session with the indicated components completed appropriately. These statistics provide a context for the data presented in the next four sub-sections, which explore the specific content of participants’ action research cycles in more detail. The four

components of the AR template which will be examined are: area of focus, strategies, data sources and findings.

Area of focus (clear question). The focus of the action research cycles is clear from participants' research questions. As noted in Table 30, participants improved over time in their ability to articulate a clear question. This improvement is likely linked to Session Four, where we focused on the importance of stating clear questions (Researcher Action Research Cycle 4). When the action research cycles submitted throughout the study were analyzed, I identified four different areas of focus: leadership skills, engaging others, influencing others and school climate. The main focus for each participant can be seen in Figure 36, which clearly shows the overlapping yet diverse interests of participants. As Figure 36 indicates, most participants' action research questions vacillated between two different areas. Three participants however, retained a consistent single focus, one on leadership skills and two on influencing others.

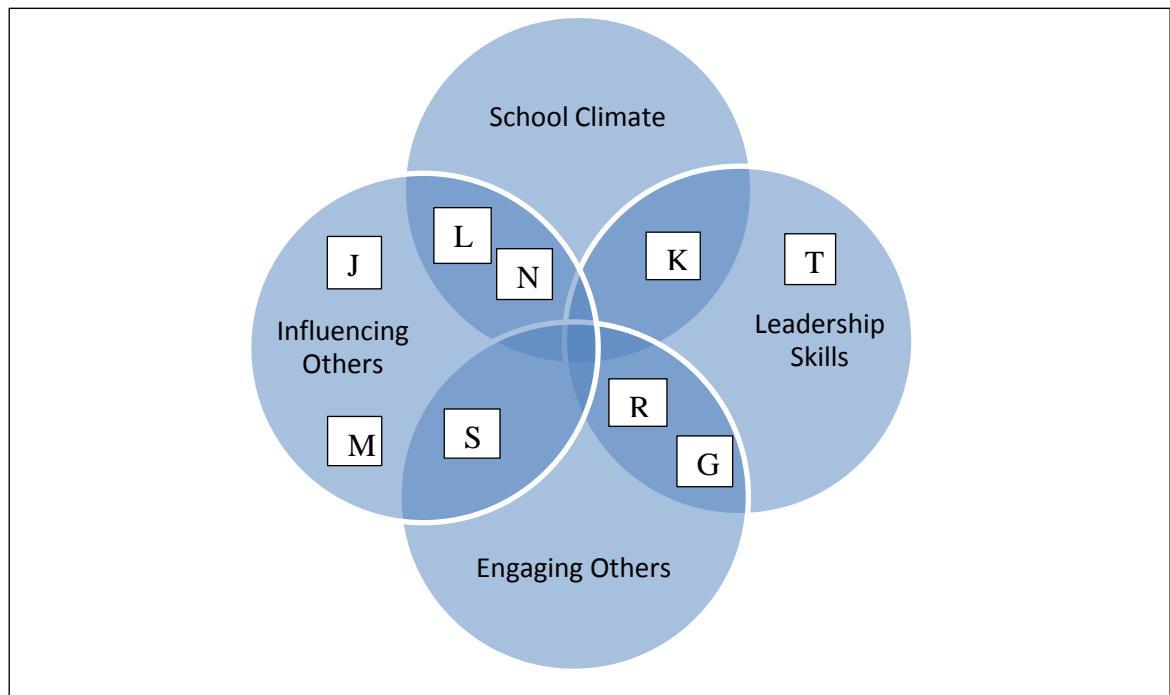


Figure 36. Participants' action research focus areas.

When Figure 36 was shared with cohort participants, participant R cautioned whether summarizing participants' foci might be too neat and tidy: "Is it this simplistic? I know that my focus was more than the two, involving at least 3 somewhere along the road. But it may be true that some themes were more prominent" (Validation Session Feedback). I agree there were AR topics which crossed categories, however the written submissions, reflect the categories captured in the figure.

Four participants embedded aspects of leadership development directly into their AR questions. Participant T focused consistently on developing her own leadership skills, posing one question that persisted through all AR cycles: "How can I function as a teacher leader for social justice in an effective way? I want to be an agent of change. I want to support colleagues. I want to empower students" (T1, October 25, 2012). Participant R focused on developing his leadership skills and engaging others with the following question: "How do I involve more partners in the Social Justice community within my community and school setting" (R1, January 10, 2013)? Participant G shared this dual focus on leadership skills and engaging others. In place of a question, she recorded the following prompts to guide her leadership during her service learning trip: "My role as a teacher leader for social justice ... Observe changes, set/maintain goals, struggle, increase agency to effect change" (G5, February 14, 2013). Participant K was the fourth cohort member to focus on leadership skills, in her case combining it with a focus on the climate in her school and division. In her AR she focused on "How can I further strengthen my understanding of social justice as pedagogy in order to enhance my ability to be a change agent" (K2r, February 14, 2013)? By spring she had decided to develop a three to five year plan for "Anti-Oppressive Education for the Queer

Community” which would focus on division-wide professional development for teachers and developing and implementing classroom resources with school colleagues that could ultimately become resources for others (K3, March 7, 2013).

The other five participants focused their action research primarily on influencing others. Participant J, a literacy support teacher, wanted to increase the number of authentic conversations she was having with teachers focused “on ways to increase challenge and accessibility of content / literacy for all students” (J1, November 29, 2012). Participant M focused likewise on influencing others, asking “How do we deal with resistant staff? How do we ensure they are meeting individual students’ needs? IEPs?” (M2r, November 29, 2013). Participant S focused on how to engage and influence others on committees: “How do I create a structure ... that will help increase productivity, opportunity for all voices to be heard and establish a sense of safety by making expectations clear?” (S2, January 10, 2013). This evolved in later cycles to sharing strategies for effective groups with school colleagues to develop a plan to ensure “equity and inclusion” (S4, March 7, 2013) on all school committees. The final two participants focused on both influencing others and the school climate. Participant L’s question: “How do I promote Aboriginal teachings, in a natural way to assist with the philosophy of inclusion?” (L1, November 29, 2012) led to her facilitating daily sharing circles which included a non-verbal student as a participating member in the classroom community. Finally, participant N focused on “Will creating a peer mentoring group help our team climate?” (N3, March 10, 2013). This focus evolved into a peer mentoring program with grade eight and nine students mentoring grade seven students. Participant N worked to transform the school culture from within by building upon positive relationships and

connections between students. To build capacity and commitment from among his peers he involved other teachers in the training and preparation of the mentors.

Strategies. Participants identified seven different types of strategies that they implemented in their action research cycles. Strategies were aimed at strengthening their own skills and those of others, while also building strong collegial relationships; implementing new processes and structures with groups; and entering into ongoing dialogue with both school colleagues and other community partners. Specific strategies included in each category are illustrated in Table 31.

Table 31

Examples of Participants' Strategies Used in Action Research Cycles

Strategies	Examples
Sharpen your own skills	Access necessary training Read research Lead Engage in regular self-reflection, use journal
Strengthen others	Advocate for and encourage Support Model and inspire Mentor and train Establish a school-wide focus
Build strong relationships	Build relationships Connect with top and bottom (of school hierarchy) Invite, recruit and target potential leaders Empower Acknowledge contributions
Use effective processes	Pause, strategize and build on success Foster leadership by targeting and engaging individuals Identify a focus and establish goals Expand sphere of influence Model inclusive practices Disseminate supportive materials and tools Share talking circle, social justice lens, characteristics of effective groups Gather data, reflect, revisit goals and follow-up

(Table continues)

(Table continued)

Establish effective structures	Vary leadership structures Promote accountability to the group Incorporate backwards design Articulate and communicate goals Collect data
Engage in dialogue	Initiate, plant seeds Engage others in dialogue, share insider knowledge Explore alternative ideas, use brainstorming Consult, use surveys Invite feedback, use exit slips
Build partnerships	Network with organizations Work together with community groups

Identifying and implementing strategies was an area of strength for research participants. Without any particular focus during leadership development sessions, almost all action research cycles included diverse and appropriate strategies to address identified areas of focus. These experienced teachers have a broad repertoire and deep understanding of possible approaches they can use to target specific areas of focus identified by their research questions. Initially, data collection strategies were not quite as well understood by most participants.

Data collection. As mentioned earlier, when discussing Table 30, participants improved over time in their ability to identify various types of data sources. Cohort members were introduced to three different forms of data collection: interview, observation and artifacts. The earliest cycles submitted often had no data sources identified or only one or two possibilities. By Session Six, the completed action research cycles submitted consistently included all three data forms, and in progress cycles frequently included all three types. This improvement can be directly linked to Session Five where participants learned about the importance of identifying diverse data sources (Logic Model Session Five). Table 32 summarizes the data forms and sources identified

by participants in their action research cycles. As already noted in other areas, this table demonstrates an increase in participants' ability to identify and incorporate diverse data sources into their plans over time. They were helped in this process by sharing strategies with each other during cohort sessions. During Session Five, Participant T provided an effective lesson on artifacts: "I brought in my artifacts. (*Shows a blank paper with only a few words and lots of doodles.*) Productive meeting or not? A great artifact as it says everything that went on in that meeting... artifacts, you don't create them, they are. You just need to recognize them."

Table 32

Data Forms and Sources Used by Participants

Data Forms	Data Sources	Sessions (S)					
		S1	S2	S3	S4	S5	S6
Interviews	Oral interviews		2	3	4	5	
	Surveys					5	6
	Written feedback			3	4	5	6
	Learning-focused conversations					5	6
Observations	Anecdotal observations		2	3	4		6
	Personal notes and reflections			3	4	5	6
Artifacts	Emails			3		5	
	Agenda and minutes			3	4	5	6
	Teacher and student work				4		6
	Lesson plan materials				4	5	6
	Graphic organizers					5	6

Findings. The fourth and final component of the action research cycle template is the findings. I examined reported findings in light of the focus areas identified by participants. Based on data from their research cycles, I discovered four types of findings for each focus area: growth, feedback, strategies with impact, and next steps. These results are reported in Table 33.

Table 33

Participants' Action Research Findings

Action Research Focus	Types of Findings	Specific Findings
Influence Others	Growth	Student behaviour, engagement, participation Teacher strategy use, involvement, efficacy School-family connections strengthened
	Responses	Positive, excitement Roadblocks
	Strategies with impact	Literacy strategies, sharing circles
	Next Steps	Data collection needs, sustained action
Leadership Skills	Growth	Addressed uncomfortable issue, stronger shared focus, insight into students
	Responses	Positive, self-reflection re comfort zone Positive and negative re strategies
	Strategies with impact	With colleagues: paraphrasing not solving With students: facilitating not leading
	Next Steps	Go beyond comfort zone, reflect on goals set, explore new leadership models
Engaging Others	Growth	Increased sense of purpose and voice Clear roles and responsibilities on committee Camaraderie on staff
	Responses	Comforting feedback Recognize own role, identify varied perspectives
	Strategies with impact	Restructuring committee Sharing readings on group process
	Next Steps	Continue data collection New questions raised
School Climate	Growth	Multiple constituencies pleased Sense of community and celebration Desire to continue
	Responses	Positive from multiple voices Problematized lack of action
	Strategies with impact	School wide celebration
	Next Steps	Common goals

What I also noted is that as the sessions progressed, more participants completed the fourth section of their cycles. Cohort members became more focused on reviewing their data sources carefully to extract what could be found from their contents: “The

feedback from the data so far has been very positive... I didn't think it would have that big of an impact" (Participant N, Session Six); and: "My reflection on this data is that there are some things happening, some progress and little successes. But ... there are also some roadblocks" (Participant J, Session Five). During Session Six one of the participants shared her data analysis process with the group. While the presentation was very well received, it was hard to determine its impact on the findings sections of the action research cycles since there was no subsequent opportunity to collect completed cycles. Since previous sessions focusing on one particular area had a positive impact on participant' practices, I am confident I would have seen an increased use of specific data analysis strategies had the sessions continued.

It was hard to determine how many of the action research cycles answered the question they posed in step one of the action research process. It is difficult because some participants followed my example and kept the same question through each cycle, so it was only partially answered in each cycle. Some participants changed their question in every cycle so it was easier to determine if they had found their answer by looking at the findings section. Of the 23 completed cycles, as seen in Table 30, it seems only 15 answered their initial question. Of the remaining eight completed cycles, participants wrote in the findings section what they had learned, but I found it did not answer the question they had posed. They often used their findings however, to articulate a focus for their subsequent action research cycle.

Impact of action research on participants. The action research process supported cohort members in three different ways. They learned more about the action

research process, developed and refined a personal area of focus and were able to monitor growth and change.

Through participating in action research and completing action research cycles, participants were able to learn the steps in the process and think through a change initiative of their own. They were able to see when they needed to try new strategies to get different results and developed plans to do so. By following the steps of the process and using the action research template, cohort members moved through the process of reflection, analysis and problem solving. They also came to understand the continuity of action research: “This journey never ends – there is always another action research cycle when you are involved in social justice and or leadership” (Participant Reflections, Session Six); and the significance of small actions: “Small steps are the important ones... It is not so much the magnitude of the self-reflection and subsequent action, it is that the action is well chosen and relevant to what is needed now” (Participant Reflections, Session Four). An additional benefit was that I was able to identify what was needed to support participants in their action research by reading their completed and in progress plans. I could also monitor growth in their understanding over time by reviewing the quality of responses in each quadrant of the template, noting improvements and identifying areas requiring further focus.

The third benefit was that through the action research process participants were able to capture progress and movement in their studies. They identified small but identifiable growth, were able to recognize impact and ultimately find success in answering their research questions. Reflecting on the benefit of doing action research one participant observed: “It has given me pause to think about what I want to ‘create’ – is it

‘action’ oriented masses or critically thinking individuals... I have concluded the latter to be my area of contribution” (Participant T, Session Six Journal). Between sessions, participants were supported in implementing their action research cycles by having learning-focused conversations with the researcher; during cohort sessions they were supported through learning-focused conversations with their peers.

Element Three. Learning-Focused Conversations

I facilitated a total of eighteen learning-focused conversations with participants. The purpose of these conversations was to strengthen the ability of participants to reflect critically on their practice, specifically on their action research. The timing and frequency of learning-focused conversations were voluntary for participants, though I did encourage each person to experience the process at least once. As can be seen in Table 34, each participant did experience at least one conversation, the mean was two conversations and the highest number was four, for a total of eighteen. Conversations ranged in length from 30 to 86 minutes with a mean length of 51 minutes. The total amount of time spent in conversations with any one participant ranged from a low of 50 minutes to a high of 177 minutes, with a mean of 101 minutes. The length of the conversations was most often determined by the time available in the teacher’s schedule, the frequency of the conversations and the distance I had travelled to meet with the teacher. Consequently, the length of conversations should not be interpreted as a measure of interest or engagement in the process.

The greatest number of conversations took place during period D, between Sessions Four and Five. This was likely due to a number of different factors: people being more relaxed after the winter break, observations I shared about low participation

Table 34

Learning-Focused Conversations by Participant: Time Period, Duration and Means

Participants	Time Period						Total	Total Minutes	Mean Length
	A	B	C	D	E	F			
G	#1		#2	#3		#4	4	177	44
J		#1		#2			2	135	68
K				#1 #2			2	70	35
L	#1					#2	2	84	42
M		#1					1	64	64
N				#1			1	50	50
R		#1		#2			2	150	75
S	#1		#2	#3			3	116	39
T				#1			1	66	66
Totals	3	3	2	8	0	2	18	912	51

Note: Time period dates: A (Sept. 20-Oct. 24); B (Oct. 25-Nov. 28); C (Nov. 29-Jan. 9); D (Jan. 10-Feb. 13); E (Feb. 14-Mar. 6); F (Mar. 7 – May 29).

rates in the conversations, a focus on action research during Session Four, and perhaps participants sensed the approaching end of the study and time for conversations was rapidly disappearing. There was substantial growth in participants' action research cycles between Sessions Four and Five, so the opportunity to talk through their studies may have been helpful in refining their action research process and resolving difficulties. The growth surprised me because in many cases there had been a very small interval between our conversation and Session Five. No conversations occurred during period E because it was only three weeks long and I needed the time to analyze Session Five data and prepare for Session Six.

In preparation for each learning-focused conversation I generated a list of reflective questions for participants based on their action research. Early questions were modelled on those I obtained through training sessions on learning-focused relationships

(Lipton & Wellman, 2003, pp. 42-43). Over time I had more confidence writing my own questions and reduced the number of questions from a high of 15 to a low of nine, by removing questions that seemed redundant. Divergent questions were phrased to be invitational and open up conversation, convergent questions were more directive and used to move a participant towards synthesis. Having a set of prepared questions allowed me to be more responsive during the conversation without fear of losing focus or direction.

Facilitation of learning-focused conversations. When I reviewed the recordings of the conversations at the end of the study, I assessed my facilitation according to the different processes used in learning-focused conversations to help others reflect critically on their practice (Lipton & Wellman, 2003). The four areas examined were the purposes of the conversation, the stances I used as a facilitator, the verbal skills I used and finally the processes I used to move their practice forward. Lipton and Wellman name two purposes for learning-focused conversations: planning and problem-solving, and reflection (pp. 42-43). I drew a distinction between planning and problem solving conversations and renamed planning as “finding direction”, as many of our conversations concerned finding a focus for their action research. I subsequently decided which purpose or purposes most accurately described the focus of each conversation. Second, I looked at my stance as the facilitator of the conversation, to see whether I functioned as a consultant, collaborator, coach, or some combination of the three. Third, in my verbal skills I looked at whether I engaged in pausing, paraphrasing, inquiring, probing and/or extending during the conversations. Finally, I looked at whether I used effective processes such as setting goals, anticipating a changed state, and summarizing the

conversation by identifying next steps at the conclusion of the conversation. This last step is most effective when done by the participant, so I made note of when I was the one doing the summarizing. My final and fifth step in analyzing each conversation was to critique my practice. I noted whether I engaged in non-supportive practices such as dominating the conversation, asking leading questions, referencing personal experience, or conducting a discussion rather than a reflective conversation. These questions formed the structure of the checklist I used to analyze my learning-focused conversations with participants.

As can be seen in Table 35, the results of the analysis of the learning-focused conversations indicate that most conversations were about finding direction or reflection.

I was predominantly in the role of coach during the conversations. According to

Table 35

Summative Analysis of Learning-Focused Conversations with Participants

	G				J		K		L		M	N	R		S			T	Total
	1	2	3	4	1	2	1	2	1	2	1	1	1	2	1	2	3	1	
Purpose																			
Direction	x				x		x	x	X		x	x	x		x			x	10
Reflection	x	x	x	x		x				X		x	x	x		X	x	x	12
Problem Solving			x							x			x		x	x	x	x	7
Researcher																			
Consult					x	x			X	x		x	x		x	x			8
Collaborate									X	x			x		x			x	5
Coach	x	x	x	x	x	x	x	x		X	x	x	x	x		X	X	x	16
<i>Principle of practice</i>			x		x	x		x			x	x	x	x	x	x	x		11
<i>Third Point</i>		x			x	x		x					x	x		x			7

(Table Continues)

(Table Continued)

Skills																				
Pause								X		x	x	x	x	x	x		x			8
Paraphrase	x	x	x	x	x	x	x	X	x	x	x	x	x	x	x	x	x	x	x	18
Inquire	x	x	x	x	x	x	x	X	x	x	x	x	x	x	x	x	x	x	x	18
Probe	x	x	x	x	X	x	x	X	X		x	x	x	x	X	X	x			16
Extend					x				x			x	x	x	x		x			7
Process																				
Set goals	x	x			x	x	x	X		x	x	x	x	x	x	x	x	x	x	14
Anticipate	x	x			x	x		x	X	x	x	x	x	x	x	x	x	x	x	15
Summarize					x	x	x	x	R	x	x		r	x		x	x	r		12 (3r)
Critique																				
Dominates		x	x					x	X			x	x							6
Leading questions									x											1
Personal References						x		x	x								x			4
Discussion						x						x								2

Note: R signifies behaviour of researcher not participant; x signifies presence of specific behaviours during conversation, and **X** signifies the dominant mode during the conversation.

Lipton and Wellman, “A coach supports a colleague’s thinking, problem-solving and goal clarification.... With a focus on cognitive and related emotional operations, skillful coaches guide colleagues in accessing internal resources and developing capacities for self-directed learning” (2003, p. 25). I frequently introduced a principle of practice into the conversation or introduced a third point such as common leadership practices they might not be familiar with or common approaches used in action research. In terms of the verbal skills described, I made the most use of paraphrase, inquire and probe, though I also used the other two strategies. Almost every conversation included opportunities to set goals and anticipate how a change initiative might unfold. Two thirds of the

conversations involved summarizing next steps, though in three instances I was the one who did the summarizing instead of the participant. My most common error was to either speak too much or take the focus away from the participant by making personal references or suggestions. I was aware of this tendency during the conversations and made a mental note to listen more and speak less in subsequent conversations.

Contents of learning-focused conversations. I also did some secondary content analysis of the conversations, in which I took notice of benefits of the conversation for the participant and ideas which surfaced. The results of this analysis are revealing. The conversations help participants to clarify their action research focus and determine a process. Participants commented freely on the benefits of the conversations:

- “Already I’m excited. For me I am going to feel like I have had some small part in helping. Thank-you so much for coming. I was just feeling, ‘Why can’t I zone in on anything?’ This was awesome. I’m very excited right now” (L1, Oct. 5, 2012).
- “Having you here is helpful. It’s helping me take a step back and see what needs to happen first.... I like this. I feel like I have a focus now” (S2, December 4, 2012).
- “I am really excited about the fact that this conversation has happened. I have a much better idea of how you measure leadership growth than I did before you walked in. So thank you for that. It’s been really good, very beneficial for us. Really good” (M1, November 21, 2012).

Conversations also benefited participants by helping them to develop concepts, insight and agency. One concept that became clearer through conversations was leadership: “I

think this is really helpful. I think I am starting to understand the fact that leadership is kind of like snow, there is no one kind of snow. It is all different. In different circumstances and different weather it takes on a different form. That's the nature of leadership" (Conversation R2, January 31, 2013,). A second participant expressed insight and a sense of agency: "I've been to a lot of really great workshops. I have a lot of really good resources. I can be a tool for change" (Conversation T1, February 7, 2013). I believe their insights were reinforced and deemed significant because they were voiced aloud during the conversations.

One of the strategies incorporated into the learning-focused conversations was to ask participants to imagine the change they were planning. The following comments from participants during learning-focused conversations reveal the practice of envisioning and anticipating change. I asked one participant, who was trying to make a committee of which she was a member more participatory, "What are some of the goals you have in mind in doing this?" The participant responded:

Shared leadership and sustainability. It should function no matter who is the chair. I don't like the idea that a committee depends on who is in charge. People should feel safe. It should be a meeting of equals. My concept of a chair of a committee is not someone who makes the decisions and then tells you after. (Conversation S2, December 4, 2012)

A second participant had a similar focus. I asked, "As you think about building leadership capacity in others, what do you want to happen and what will you see and hear as it happens?" The response was:

I'll see the ability of the school to respond. We'll be anticipating leadership capacity developing in others, (the) ability of school to respond will be less based on roles people play and be more of a team, this is *our* issue, this is *our* problem. I think as a result there will be more buy in to the (sic), to change and to creating space. Because we are all seeing the value of it or we are able to move. (Conversation R2, January 31, 2013)

As they articulated their vision of a different future, participants became more passionate, committed and clear about the changes they wanted to see. Table 36 synthesizes the benefits of the learning-focused conversations and identifies significant topics which arose during the learning-focused conversations with participants. The topics represent significant aspects of teacher leadership.

Table 36

Benefits and Topics of Learning-Focused Conversations

Benefits of Conversations	Emergent Topics
Clarify focus	Action research process
Determine process	Value of collaboration
Develop concepts	Reflective process
Develop insight	Influencing groups from within
Develop agency	Mentoring and reciprocal peer relationships
	Facilitation of groups
	Dimensions of teacher leadership

Researcher reflections and learning-focused conversations. When en route to conversations that took place out of town, I dictated researcher reflections into the digital recorder. My reflections indicate that the trips provided me with an opportunity to gain perspective and ponder alternatives. The seven reflections covered a variety of topics including the research process, facilitation of leadership development sessions, the conversations themselves and the cohort.

I worked through challenges in my data analysis and brainstormed ideas for future sessions. By talking aloud I was able to explore my options, rehearse various ideas and reach resolution about session content. I also reflected on the arguments I was having with myself about how to balance power between myself and participants:

There's a lot of choices I make about what we are going to do. To keep me honest about what we do I need to monitor the power. I am balancing the research I did in preparing for the cohort about what makes a difference. I am balancing the model, I am balancing theory and practice and the reality of what is reasonable, what is real, where do we go from here? (Researcher Reflection, November 27a)

I clearly used the reflective process to remind myself of my role as facilitator and process designer and planned how to gather more in depth feedback from participants.

One of the questions I tried to answer was how important it was that I visit participants in their schools. The visits allowed me to gain some insight into the realities of their context. For example, when one individual began speaking very quietly, I came to understand some of the constraints present in that particular work context (Researcher Reflection, Feb. 7, 2013). I felt that having the conversations in their school kept participants very grounded and realistic:

The actual conversations ... resonate because they happen in the place where they are going to carry out the ideas they are thinking about. ... I think they are also more conscious of the potential obstacles to their plans. (Researcher Reflection, May 8, 2013)

The benefits of having the conversations on location were 100% supported by participants during the Validation Session, as were the overall benefits of having the conversations.

When I asked during the Validation Session if perhaps participants would have benefited from getting a copy of their conversations in either digital or written format, the group was not conclusive one way or the other. This indecisiveness suggests, not surprisingly, that there are differences in participants' learning styles. For some, the act of participating in the conversation was the most meaningful, whereas others felt that the conversations were very intense and valuable and that they would benefit further from listening to the conversations again.

In my reflections I was clear I felt the learning-focused conversations allowed participants to articulate their thoughts out loud, envision change, make decisions and identify next steps: "The opportunity to think through a change initiative, to articulate and say out loud what you are thinking about, seems to be a very important part of the conversation" (Researcher Reflections, Nov. 21, p. 3). One very common purpose of the conversations was to help participants narrow their focus:

Learning-focused conversations have provided an opportunity to pause and reflect on their practice and to think about one aspect of it, as opposed to our constant multi-tasking and balancing multiple variables. In a learning-focused conversation, and because of the action research, the two structures working together have supported people in choosing a small focus. (Researcher Reflection, Jan. 31)

By meeting cohort members for learning-focused conversations, I was able to get to know them better on an individual basis. Over time I was able to gauge their level of comfort or frustration with their action research. This allowed me to coach them appropriately at the time and also influenced the way in which I planned subsequent sessions. These researcher reflections were a good source of insight into my thinking at various stages in the journey because I used the process to capture and process my thoughts.

Impact of learning-focused conversations. The learning-focused conversations seemed to develop teachers' agency in a number of different ways. They allowed people to accomplish each of the following:

1. Stop and think about one aspect of their practice
2. Clarify direction
3. Set goals
4. Plan for data collection and reflection
5. Make decisions
6. Envision change
7. Anticipate possible obstacles
8. Troubleshoot action research
9. Celebrate growth

The learning-focused conversations were effective tools for participants and me.

Frequency seemed to be less important than the ability to respond in a timely manner to a participant's request.

As mentioned, conversations were also held between participants during leadership development sessions. During these paired conversations, cohort members were able to assist each other with reflective thinking using active listening, paraphrasing, goal setting and summarizing. These conversations were much easier to set up and were very effective given the shared experience and close relationships of people in the cohort. An added benefit was that cohort members were able to learn skills, particularly paraphrasing, which they were able to apply in their own leadership work. Participants rated these partner conversations as equally effective as those with the researcher: “I liked the learning conversation with G – she is a good listener and even to say things out loud sometimes helps me to distill my ideas towards action” (Participant Reflections, Session Four). “Speaking with K about my action plan and the next steps. She asked great questions that encouraged me to think critically about my work” (Participant Reflections, Session Six). This suggests the value of the learning-focused conversations lies in the process that is followed, and that their value is not dependent on the facilitator having expert knowledge of the topic under discussion.

Participant feedback on learning-focused conversations. Participating in learning-focused conversations was a very helpful process for participants, something they recognized once they had the experience. They responded positively to the conversations and many requested multiple conversations. Participants found they were helpful in clarifying both action research and the purpose and structure of learning-focused conversations themselves. For some participants the conversations were appreciated as an opportunity to explore and debrief personal and confusing experiences. Frequently these partner conversations provided an opportunity to deal with the emotions

generated through their work: “So much of the conversation with this cohort helped me deal with teachers with very personal agendas... that is not how I am... I am not going to stand in a corner and say this is what the real issue is and this is what everyone should do” (Participant T LFC, Session Six).

Participants found the learning-focused conversations to be very intense and engaging. The insightful and challenging questions posed by the mentors provided a chance for cohort members to engage in guided critical reflection. Problem solving was an integral part of the process and through the processes of dialogue and reflection participants were able to identify their next steps. During one LFC I remembered one participant, a literacy coach, saying enthusiastically “I need to know how to do what you are doing. I need to know how to do these conversations with teachers” (Researcher’s LFC with Critical Friend, November 22, 2012). For another participant the value of the LFCs was critical: “These LFCs were the most impactful learning times for me” (Participant R, Validation Session Feedback).

Facilitating learning-focused conversations was also a learning experience for cohort members. They found they learned a lot about paraphrasing and how to tap into its potential as a mentoring tool. They learned to ask challenging, invitational and reflective questions even though as teachers, cohort members already had experience posing good questions to students. What they learned through facilitating conversations with their peers was how to facilitate conversations that helped their colleagues reflect critically on their own practice. This experience built upon their strong foundation in the process of reflection, while also developing new skills and insight into effective practices for mentoring adults.

Element Four. Dialogue

Dialogue is different from the other elements of the leadership development model in that dialogue was a part of many of the learning experiences we engaged in as a cohort. Dialogue was the way in which we made sense of new ideas, shared experience and problem solved. It supported us in getting to know ourselves and others better. Dialogue inspired cohort members and helped them feel invigorated. It helped them feel there was common purpose and value in their shared work. Dialogic activities were opportunities to ask questions, resolve roadblocks, and perhaps most importantly engage in meaningful dialogue with other like-minded individuals.

There were both small group and large group activities which were interactive. Dialogue was the intended purpose for some activities; while for others dialogue was simply required to carry out specific learning tasks. Specific structures and strategies were used for some dialogic activities, while others were more spontaneous. The variety was appreciated by participants: “I really appreciate the structure in place that gives us the opportunity to work in small groups or pairs with everyone in the group” (Participant S, Sharing Circle, Session Three). Patterns can be discerned by reviewing the dialogic activities in the leadership development sessions. Large group conversations that were common in early sessions were replaced with small group sessions later on. There was also a trend away from the open dialogue found in Sessions One and Two, towards more strategic design for activities as the sessions proceeded. In fact almost every specific learning experience after Session Two was structured for effective small group discussion, except for one unstructured lunch conversation which extended into the afternoon.

Each specific learning experience is displayed on Table 37 or 38, according to whether dialogue was the purpose of the experience (37) or the process used to complete a task (38), whether it was done with a large or small group and whether it was a structured (italicized) or unstructured (not italicized) learning experience. On the right side of the table, each specific learning experience is also analyzed according to the four steps of Mezirow's (2000) transformative learning theory. I used the labels of none, some, most or all to indicate how many in the group demonstrated each step of Mezirow's process. These ratings represent my best judgement based on the audible contributions of participants. The limitation of this process is that there is no way for me

Table 37

Analysis of Cohort Dialogue Using Mezirow's Transformative Learning Stages

(Purpose)

Dialogue as Purpose					
Small Group					
Specific Learning Experience	S	Critical Reflection	Disorienting Dilemma	Disequilibrium	Reaching Resolution
<i>Reflect, regroup and return</i>	1	All	All	All	All
<i>Article jigsaw and presentations</i>	4	All	All	Most	All
<i>Fierce conversations</i>	5	All	All	All	All
Large Group					
Lambert reading discussion	2	Some	All	Some	Some
Empathy	2	All	All	Some	None
Self-assessment dialogue	2	Most	All	Some	Some
Action research debrief	4	All	All	All	All
<i>Conversation with COSL chair</i>	6	All	All	All	All

Note: "S" refers to "session" and italicized text indicates structured learning experiences.

Table 38

Analysis of Cohort Dialogue Using Mezirow's Transformative Learning Stages (Process)

Dialogue as Process					
Small Group					
Specific Learning Experience	S	Critical Reflection	Disorienting Dilemma	Disequilibrium	Reaching Resolution
<i>Carousel brainstorming</i>	1	All	None	None	All
<i>Key concepts, key ideas</i>	2	All	All	Some	None
<i>Social justice lens working groups</i>	5	All	All	All	All
Large Group					
Appreciative inquiry	2	All	Some	Some	Some
Anti-Homophobia Video	2	All	All	Some	Some
<i>Dancing Guy Video</i>	2	All	All	Some	Most
<i>What's the big idea?</i>	3	All	Some	Some	Some
<i>Compass points four directions</i>	3	All	All	Some	None
Lunchtime conversation	5	All	All	Some	Some
<i>SJ Video</i>	5	All	Some	Some	Some

Note: "S" refers to "session" and italicized text indicates structured learning experiences.

to determine the insights of those cohort members who did not make verbal contributions during the dialogue. This brings me to a final point of analysis regarding dialogue during the cohort sessions, the question of participation.

Active participation in dialogue is most easily recognizable when individuals make verbal contributions to the discussion. Also important however, are the non-verbal contributions including active listening, and gestures such as nodding agreement, shaking a head in disagreement or visibly "tuning out" of the conversation. During Session Two I felt the conversations were dominated by a small number of participants with others tuning out, likely because the group spent far too much time in large group dialogue.

When I reviewed the videos of the session my intuition was confirmed as only a small number of participants contributed verbally to the conversations. As a result I significantly changed my approach for subsequent sessions. This is reflected in Tables 37 and 38, where you can notice that there were a lot of large group activities listed for Session Two, with no strategies in place to facilitate the discussion. Subsequent sessions were more often small group and with structured facilitation. I also incorporated a lot of content on the characteristics of effective groups in Session Three. This sharing allowed me to address the issues of design, balance and active participation with the cohort directly.

Analysis of dialogue activities. Cohort members indicated to me through participant feedback, carousel charts, and in response to theme statements, that dialogue was a significant aspect of leadership development sessions for participants. I was not surprised to find that the conversations allowed participants to get to know themselves and others better, be inspired and invigorated, share common themes and frustrations, feel validated regarding the impact of their collective work, engage in meaningful conversations with like-minded people, troubleshoot ideas and ask questions. These findings did not surprise me as they echo the characteristics of collaborative groups identified by Lipton and Wellman (2011b).

Building upon the characteristics of collaborative groups, Lipton and Wellman (2011b) stress the importance of facilitation: “Skillful leaders establish a frame for specific discourse patterns and purposes” (p. 11). When I did not articulate a frame or structure for the conversations they were less productive. I established a protocol for all partner and small group work. For large groups conversations I very often did not.

However after Session Two I learned to structure large group dialogue activities for subsequent sessions. It was interesting that specific structures and strategies supported conversations that led to transformative learning.

Another area of learning made clear from reviewing Lipton and Wellman's descriptions of effective groups is about what happens when a group leader makes a mistake and takes steps to fix their actions:

By admitting mistakes and recovering from them, we increase both trust and credibility with group members. In fact, skillful recovery often develops stronger bonds between group leaders and group members than do more seamless group leadership processes. Our willingness to re-examine and modify structures, processes and protocols based on group member feedback amplifies the collaborative energies of the group and reduces dependency on us to be the master of all moments and the solver of all problems. When we step back to reframe purposes and tasks and to clarify outcomes, we develop shared ownership of the group's work and the group's development. (2011b, p. 12)

I selected this extensive quote to support my decision in Session Three to go public with what I saw as weaknesses in my facilitation and to begin to request direct feedback from the group on my performance. I also associate it with my decision to confront the domination of the large group dialogue by a few people. That was a risk, in terms of my relationship with the group, but I felt it was a consequence of my lack of planning for facilitation of the large group discussions and therefore important to discuss, so I shared

my learning with them. In doing so I feel I made it safe to make mistakes, strengthened the group, and allowed them inside the process of planning for group sessions.

Preskill and Brookfield (2009) identify nine behaviours which make learning a way of leading. Building on a foundation of critical reflection, they identify behaviours necessary to contribute to the growth of others: listening, staying curious about others, asking constructive questions, learning the stories of co-workers and championing co-workers goals (p. 62). These behaviours describe what occurred during our dialogue sessions. According to Preskill and Brookfield, part of what occurs through dialogue is reflection on experience and trying to make sense of what happened: “Analyzing experience improves our understanding, helps us to make connections, and sometimes leads to alternative means for addressing problems” (Preskill & Brookfield, 2009, p. 105). The collaborative analysis of experience has particular impact:

When people analyze experience together, the diversity of perspectives and histories offered allows them to compare and contrast experiences, thereby drawing out common connections and major differences. As experiences are shared, it often becomes evident that even though each story is unique, there may be striking similarities – recurring themes that unite seemingly disparate experiences. (Preskill & Brookfield, 2009, p. 106)

This sense of finding common purpose through listening to each other’s experiences explains what happened during conversations, especially those which followed presentations by cohort members. Dialogue also developed our ability to stay open to the contributions of others by learning to question: “Questions ... keep information flowing and ensure knowledge is shared. They help individuals, organizations, and communities

learn. ... Questions keep us honest regarding who we really are, where we are really going” (Preskill & Brookfield, 2009, p. 128). Questions help us seek answers to what do we want and how do we make it happen.

Conversations in the cohort were frequent, intense, varied and rich. They reflected the three rules for dialogue articulated by Burbules (cited in Shields & Edwards, 2005): participation, commitment and reciprocity. Cohort members commented regularly on the luxurious nature of our dialogue sessions in which there was time to talk with like-minded individuals and a supportive environment in which to do so. Through the varied lenses held up to our conversations it is clear that the dialogic nature of cohort sessions was critical to their value and impact for participants.

Impact of dialogue on participants. Engaging in dialogue allowed cohort members to process experience and content collaboratively. Since participation in large group conversation was voluntary, dialogue provided an element of choice. Whether or not they spoke, participants still engaged in critical reflection as they listened to others and processed what they heard. The opportunity to process new information with others was appreciated by cohort members, particularly for difficult and complex concepts presented through readings. Working through frustration and confusion with others assisted participants in moving through the transformative learning process, progressing from a state of disequilibrium, through critical reflection to a new state of resolution and identification of possible action. Dialogue also allowed people to connect their personal experiences to the theoretical ideas that were being explored in a personal way: “The dialogue is especially helping me become stronger. It validates my belief system” (Participant L Journal, Session Three).

Dialogue also offered opportunity to share personal experiences and identify common interests. As different perspectives were shared there were opportunities to provide emotional support where warranted. When people shared their first hand experiences creating change it helped others gain insight into the change process. They learned about the micropolitics involved when working within systems. They developed insight into how context impacts the change process and some of the obstacles that get in the way of distributed leadership. Through dialogue the nuances of creating change were shared among group members and agency was strengthened.

New ideas and possibilities were also explored through dialogue. The cohort discussed ways to apply new concepts in their work and mused about the potential of adopting certain change strategies. Thinking collaboratively helped cohort members understand a variety of perspectives and deepen their own understanding of issues and processes. Dialogue also helped the group and its individual members generate new questions and inquiries to inspire and guide further exploration and change. Sometimes the provocation for dialogue emerged from topics and issues raised through the process of self-assessment.

Element Five. Self-Assessment

Participants in the cohort completed the Social Justice Teacher Leadership Self-Assessment (SJTLSA) tool twice during cohort sessions, once in Session One and a second time in Session Six. The tool consists of six sections with fifteen fixed response items per section; a self-scoring, reflection and goal setting page; and a personal relevance section aimed at identifying a focus for action research within teacher leadership for social justice. When responding to items, participants had a choice of the

following ratings, abbreviations and values: strongly disagree (SD) (1), disagree (D) (2), unsure (U) (3), agree (A) (4) and strongly agree (SA) (5). Participants took about 45 minutes each time they completed the tool. During Session Six they also completed a reflection on the self-assessment tool (SAR) in which they responded to prompts about the various sections of the tool, shared their personal beliefs, described any shifts in understanding within each area and identified what contributed to those changes. One further reflection was captured through the Session Six carousel experience in which they responded to questions about reflective practice. In the Validation Session they also responded to the revised scoring system developed in response to feedback.

SJTLSA process. Participants were provided with both oral and written instructions before completing the tool. The first page provides the purpose and intent and the second page provides a synopsis of each section of the tool. Participants were encouraged to make use of post-it notes and the two blank spaces at the bottom of each section to write in additional items they felt were important. Once the first section was complete they were encouraged to take a break if they wished before moving on to the final action research section. During Session One, participants wrote in one additional item in each section, in Session Six there were no additional items suggested.

SJTLSA revision. In reviewing the written comments in both sessions, I noted that there were a number of people who substituted “sometimes” for “unsure”, the middle rating. Others wrote “for some people” when selecting this central rating. As the meaning of the central option seemed inconsistent and somewhat unclear, I revised my weighting scale to negate the impact of the central rating of “unsure”. The revised rating scale was as follows: SD (-2), D (-1), U (0), A (1), SA (2). This change removed the numerical

impact of the responses of those who were unsure of their answer and reduced the impact of “unsure” since it was a different category than “agree” or “disagree”. Had I chosen “neither agree nor disagree” in place of “unsure”, or chosen to only offer four options, this issue could perhaps have been avoided. Feedback from cohort members during the May 30 Validation Session was overwhelmingly supportive of the revised scoring: “This one is more true. When I look back at the answers this one is better” (Participant T, Validation Session). When presented with graphs generated from the two scoring systems, participants stated that graphs generated from their revised scores more accurately reflected their personal experience (Self-Assessment Scoring Revision Feedback, May 30, 2013).

SJTLSA results. My initial foray into the data collected through the STJLSAs was to look at the range of responses per item. I identified 29 items in Session One and 15 items in Session Six with a response range of four (e.g., -1 to +2) on the rating scale. When I expanded my search to items with a three response difference (e.g., -2 to 0), I found there were 40 items in Session One and 34 items in Session Six. These items with large variation in response were perceived as potential areas of disagreement and consequently used to stimulate dialogue within the cohort. The clearest example of this was in Session Two when I asked the group to discuss their responses to items 77, 80, 82, 84 and 89 (see p. 188) in the School Cultures section. The resulting rich conversation was intense and lasted close to 45 minutes.

A second analysis was to examine patterns in the responses per section of the tool. Table 39 identifies the range, median and mean for each section of the SJTLSA for both Session One and Session Six. Overall scores indicate that the range decreased between

Session One (46) and six (40), as a result of fewer high ratings in the first three sections. The tool section medians increased in all cases, except for school culture where it decreases, “I was really sad to answer some of those questions” (Participant T, Response to Activities, Session One). The tool section means increased in all cases between Session One and Session Six, with the most substantial increases occurring for Knowledge and Personal Experiences.

Table 39

Range, Median, Means for Sessions One and Six SJTLSA Responses (Per Section)

Section	Range		Median		Mean	
	S1	S6	S1	S6	S1	S6
Dispositions	17 - 33	18 - 28	24	26	24	26
Knowledge	6 - 34	18 - 28	21	23	20	23
Personal Attributes	9 - 30	13 - 28	16	19	17	18
Personal Experiences	3 - 24	11 - 28	17	23	14	22
Leadership Skills	4 - 24	10 - 29	14	16	15	16
School Culture	-12 - 11	-12 - 7	4	2	0	1
Overall	-12 - 34 = 46	-12 - 28 = 40	16.5	21	15	18

Note: S1 means Session One and S6 means Session Six.

Figure 37 represents this same data graphically. The increases in each section are visible on the bar graph. The positive shifts in Personal Experiences and Knowledge, according to participant feedback, are the most directly related to the leadership development sessions (Self-Assessment Reflection, March 7, 2013). Minimal growth is visible in Leadership Skills and Personal Attributes. Personal Attributes like Dispositions likely change little over a short period of time. Leadership Skills may also take longer to

develop and will grow from the increase in knowledge and personal experience. I anticipated this slow growth in leadership skills, believing people need to experience a change strategy or learning technique first as learners before they can facilitate such processes for others. Although participants experienced appreciative inquiry and transformative learning, they did not feel competent to facilitate these processes by the end of the sessions. There was some growth towards more positive perceptions of school context, though the shift was minimal. This category had the highest number of “unsure” responses, generated the most tension for participants and consistently scored the lowest in all versions of the tool. This is significant because the context in which change is pursued has a strong impact on change agents and influences their work significantly.

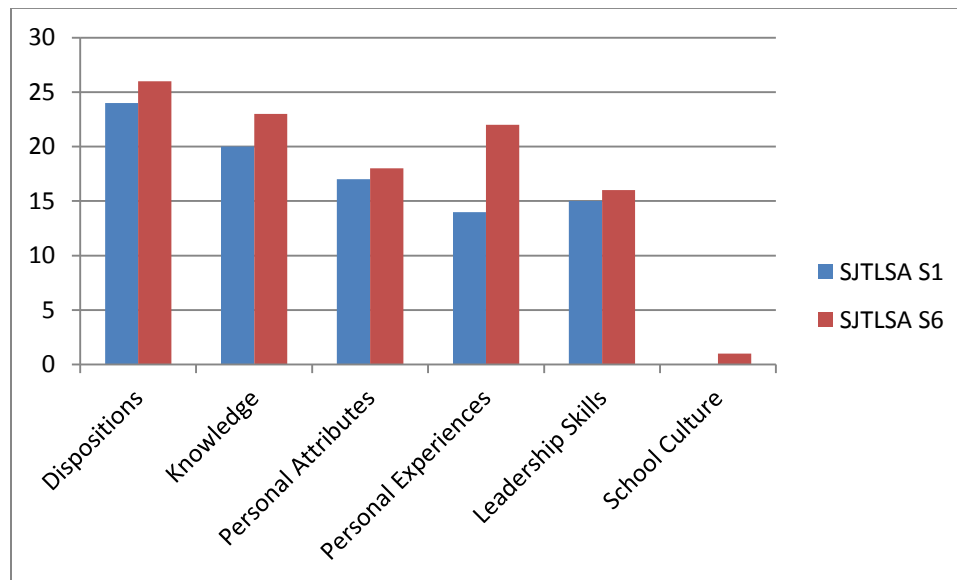


Figure 37. Comparison of mean scores of SJTLSA responses sessions 1 and 6.

One further analysis of SJTLSA data generated some interesting results, shown in Figure 38. When I examined the number of “strongly agree” responses between the sessions, there was an increase in every section. This increase may mean participants were more confident in their own opinions or perhaps that they had a better

understanding and more familiarity with the items in the tool. The exception to this pattern is in the Leadership Skills section. The decrease in “strongly agree” ratings in the leadership section comes from two sources, participants who had learned more about leadership and thus rated themselves lower on performance, and participants who indicated to me they were feeling discouraged with the impact of their leadership when they were completing the second self-assessment.

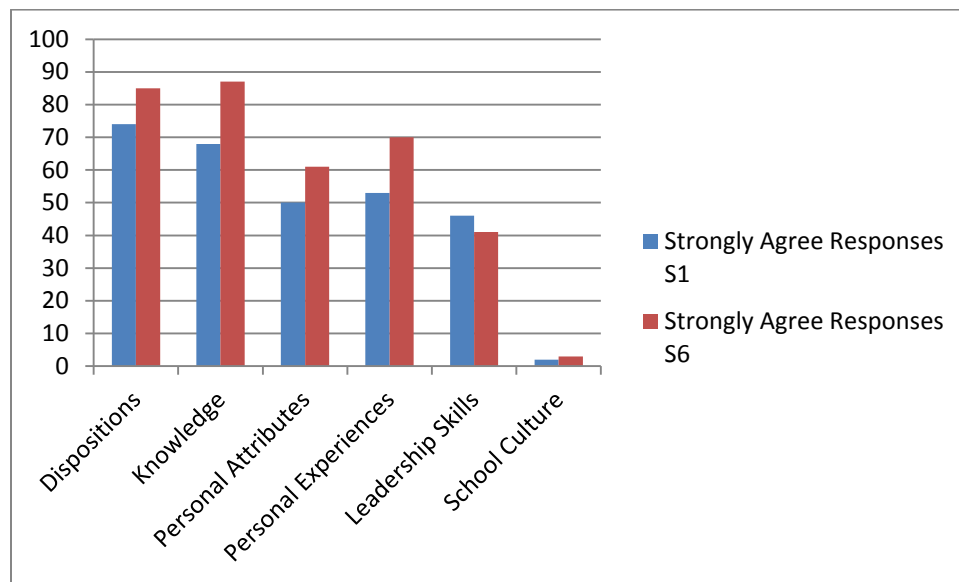


Figure 38. A comparison of strongly agree responses to SJTLSA items in sessions 1 and 6.

Personal relevance and focus for action research in SJTLSA. On the final page of the STJLSA, participants were asked to work their way through a series of questions designed to help them narrow down a focus for their action research study. Table 40 presents the themes in the responses to each question in Sessions One and Six. Interestingly, many themes remained consistent throughout the study, what shifted was the vocabulary used to name and describe the issues of focus. Conceptual terms such as “leadership capacity”, “marginalized students” “equity”, “cultural competency” and

“agency” are more prevalent in Session Six responses. While shifts in participant responses were noticeable, I also likely shifted in my understanding and categorization of themes as the study progressed. The causes of greatest concern or tension remained totally consistent throughout the study: sustainability, optimism, effectiveness and collegiality. Also consistent were individual areas of focus such as inclusion, Aboriginal education or LGBTTTQ inclusive practices.

Table 40

Summary of Themed Data for Personal Relevance (SJTLA) for Sessions One and Six

	Focus of Question	Session One	Session Six
A	Leader for adult colleagues	Committee work, PD, leading student groups	Facilitate shared leadership
		Professional or teacher association leadership	Voice shared concerns
		Advocacy for students and staff	Support Colleagues
		Mentor colleagues	Empower Colleagues
		Partner for safe conversations	Develop understanding
		Model desirable behaviours	Share personal knowledge
B	Pressing social justice issues	Establish a common vision	Build leadership capacity
		Increase inclusive environments	Access to literacy and inclusion
		Needs of at-risk learners	Support for marginalized students, increase equity
C	Potential social justice focus	Collaboration and ownership	Communication, safety and voice
		Effective learning environments	Cultural competency and policy implementation
		Aboriginal education and LGBTTTQ inclusion	Inclusion and literacy
D	Current performance level	Beginning	Finding tensions
		Middle	Getting better
		High	Good

(Table continues)

(Table continued)

E	Greatest concern or tension	Sustainability	Sustainability
		Optimism	Optimism
		Effectiveness	Effectiveness
		Collegiality	Collegiality
F	What to accomplish	Build leadership capacity	Structures for participation
		Common vision	Positive vision for student success
		Embed inclusion and Aboriginal education	Sustainable inclusive change
		Collaborative environment	Support colleagues to develop agency

During Session Six, in addition to completing the SJTLSA, participants were also asked to complete the Self-Assessment Reflection (SAR).

Self-Assessment reflection (SAR). The SAR tool was designed to facilitate critical reflection about shifts in thinking and areas of personal growth since the cohort began. Table 41 summarizes the participants' reflections that indicate positive changes in each category of the self-assessment tool; the second column shows the leadership development session experiences they believe influenced the change. What is clear from the table is that participants felt the learning experiences undertaken within the leadership development sessions contributed greatly to the increase in their scores on the self-assessment tool between the first and second time they completed the SJTLSA. Activities they credited for contributing to growth the most frequently are discussion or dialogue, the cohort group, readings, action research and learning-focused conversations: "This cohort is my experience – sharing struggles, acquiring and processing new information as part of a group" (SAR, Session Six). Positive changes associated with factors outside the cohort include increased personal experience and familiarity with the school culture. Beneficial outside influences include university coursework and school-based conversations.

Table 41

Summary of Participants' Self-Assessment Reflection (SAR) Data Showing Positive Change, Shifts and Influences

Positive Changes	Internal Shifts	Internal Influences	External Shifts	External Influences
Disposition Changes	Clearer belief system See teachers as change agents Stronger disposition Increased personal experience Value justice for marginalized students	Learning opportunities Readings Discussions Shared beliefs of cohort Growth in understanding Valuing personal beliefs		
Knowledge Changes	How to mediate conflicts Language for conversations	Readings Dialogue Activities Action research Skill development Relationships of trust		Personal experience Relationships with colleagues University courses
Personal Attributes Changes	Growth in personal readiness Increased skill level	Discussion with colleagues Critical reflection Readings		Experience University courses State of mind when completing SJTLA
Personal Experiences Changes	More intense response Experience with LFCs and AR Greater interest and comfort being a teacher leader More agency	Supportive community Learning-focused conversations Critical reflection Action research		
Leadership Skills Changes	Increased skill level Experience forming groups Experience facilitating groups and problem solving discussions Seeing questions differently due to strength-based perspective	Skill development and practice Reflection and self-awareness Knowledge acquisition Discussion Experience Increased confidence and agency		
School Context Changes		Critical reflection	Know school better Understand school culture	Believe voices are being heard Developing familiarity with school School-wide conversations

(Table continues)

(Table continued)

<p>Action Research Changes</p>	<p>Greater sense of purpose, direction and focus Increased understanding, knowledge and experience Working on issues through action research More empowered, less blaming Shift from personal attributes to leadership and school culture</p>	<p>Training Discussion Knowledge Questions Space created Increased personal awareness, confidence and agency Self-Assessment Critical reflection Personal development Consistent focus Shift of focus</p>		<p>Increased experience</p>
<p>Personal Relevance Changes</p>	<p>Clearer more process-oriented focus Accepting that change takes time Moving forward with firm foundation and AR approach</p>	<p>Cohort Clear focus Doing action research Reflection Discussion Reading Thinking Learning-focused conversations Change process</p>		<p>University courses Increased teaching and learning experience</p>

Factors that hampered positive growth were also identified by participants. These factors were categorized as external influences and included: a decline in personal performance, feeling less optimistic, more complacent and increasingly frustrated, neglecting self-care, and deficit thinking about colleagues. Strong negative external influences included a negative school environment, an atmosphere of “blame and complain”, lack of school-based mentoring and feeling stagnant. The majority of these negative comments came from two participants. One had recently taken a medical leave from her position which contributed to many of the above mentioned issues and impacted personal health. The second individual was in a period of personal transition and had reduced her leadership roles somewhat. This individual was very self-critical and disappointed with her recent leadership contributions as they were less than in the recent

past. Both individuals indicated on reflection that their state of mind at the time they completed their second self-assessment had influenced their responses.

According to participants, involvement in the cohort contributed to growth in their dispositions, knowledge, personal experiences and leadership skills. They noticed little growth in their personal attributes, though one noted that the cohort contributed to an increased understanding of how one's personal attributes can influence leadership for social justice. Similarly, there was no easily identifiable growth in the category of school context, though cohort members commented that critical reflection helped them to understand their school context better.

In the final section of the SJTLSA members wrote about personal relevance and action research which reflected considerable growth. Participants seemed to be more comfortable expressing their leadership roles, the processes they intended to employ and the outcomes they desired. Their choices reflected increased understanding of action research and the agency of teacher leaders. During Session Six participants also completed a specific carousel activity in which they responded to questions about the value of reflective practice.

Themes emerging from responses to carousel questions. Completing the SJTLSA helped cohort members initially to identify themselves as teacher leaders and change agents. As time went on and they built confidence, they recognized that they hadn't always seen themselves that way. By breaking down the different elements of teacher leadership for social justice, the SJTLSA tool allowed members to reflect on their attitudes and their practice, identify strengths and weaknesses, and gain a clearer perspective of what was happening (Carousel Reflection Feedback, Session Six).

Impact of self-assessment on participants. The self-assessment process helped cohort members in two ways, the process was effective and the responses were informative. The process was helpful because it facilitated self-reflection and dialogue. Individual items were used to stimulate conversation amongst the cohort. It was interactive and the use of post-it notes and blank space supported the personalization and relevance of the tool. The use of the intensity scale encouraged participants to reflect on the frequency with which they engaged in certain behaviours.

Responses to the self-assessment items generated new questions. The open-ended response section of the tool also identified formal and informal leadership roles fulfilled by participants and social justice and leadership issues they considered important. It identified their levels of skills, areas of greatest concern and intended goals. Another way in which participants were able to gain perspective on their leadership was through receiving peer feedback.

Element Six. Peer Feedback

Peer feedback was solicited formally on two separate occasions and informally throughout the cohort sessions. The first formal peer feedback came from colleagues of each participant who agreed to complete the Social Justice Teacher Leadership Peer Reflection (SJTLPR). This feedback was shared with participants during Session Three. The second formal opportunity for peer feedback was during Session Five, when research participants received additional peer feedback from their identified colleagues, and also exchanged Valentines (personal positive written affirmations). Informal opportunities for peer feedback occurred following activities facilitated by cohort members during discussion of the participant feedback sections of the logic models and during sharing

circles. Summative data on the peer feedback process was collected during Session Six as part of the carousel activity.

Peer review process. Cohort members were asked to provide the names of three colleagues who they wanted me to approach to fill out a peer reflection. I issued requests by email and followed up on positive responses with a return email containing the letter of informed consent which spelled out their responsibilities. To those who agreed to participate, I mailed a copy of the SJTLPR along with instructions, copies of the letter of consent and a stamped self-addressed envelope. As completed peer reflections arrived I gave them an alphanumeric code so I could identify their source yet keep them anonymous when sharing them with individual cohort members during Sessions Three and Five.

Response to peer reviewer requests. With each participant naming between three and four potential peer reviewers there were a total of 29 invitations issued. Of those 24 agreed to participate and 23 followed through by submitting a completed SJTLPR. About one third of the requests went to teaching colleagues and school principal or vice-principals, followed by teachers in different schools, superintendents and divisional support staff. Not surprisingly, superintendents and principals were the least able or likely to participate (Table 42).

Table 42

Peer Reviewer Response Rates

Colleague's Position	Named	Agreed	Completed
Teacher in same school	9	8	8
Principal or Vice-Principal	9	8	7
Union Official	1	1	1
Division Support Position	2	2	2

(Table continues)

(Table continued)

Teacher in different school	4	4	4
Superintendent	3	1	1
Non-teaching colleague	1	0	0
Total	29	24 (82.8%)	23 (79.3%)

Strengths and stretches. For Session Three, I asked participants to record their personal strengths and stretches on a T-Chart using their SJTLSA responses, and then add to their charts after reading the SJTLPR feedback they received from their peers.

Participants found the feedback confirmed their self-assessment, helped them identify personal goals, raised questions about different perceptions of shared experiences like school culture and was interactive, since they could choose whether to agree with the feedback or not. Some participants were disappointed in the contents of their peer reflections, they had hoped for a more critical response, others were pleased with the feedback and found it informative (Participant Reflections, February 14, 2013).

Valentines. Many cohort members received additional feedback during Session Five. The Valentines were the product of an unstructured writing opportunity during which participants were encouraged to express in writing what they valued and appreciated about the personalities and contributions of other individuals in the cohort. What emerged was a vision of how participants are perceived by the group and which characteristics are valued by group members. The most common descriptors used by cohort members in the Valentines were passionate, positive, optimistic, committed, knowledgeable and generous.

Johari's window. Participants were asked to sort the Valentines they received from other cohort members onto a Johari's Window template (Luft & Ingham, 1955), which was divided into four equal sized sections: things I know about myself that others

know (Arena), things I know about myself that others don't know (Hidden Area), things I don't know about myself that others do know (Blind Spot), and things I don't know about myself that others also don't know (Unknown Area) (Ford, Knight & McDonald-Littleton, 2001). The peer feedback was used to complete the template and flesh out the picture. The process of receiving and classifying Valentines and peer feedback was helpful in identifying some personal attributes that participants may not have been aware of and both were powerful tools for self-reflection.

Using the Johari's window template to sort through both the SJTLPR peer feedback and the Valentines from cohort members, allowed people to reflect on their self-knowledge and the ways in which they were perceived by others. There was an equal balance between known and unknown feedback from others which indicated that the two peer feedback processes did generate new information for participants. There was also a list of equal length in the private area, known by the self but not by others. This indicates that despite the close relationships developed in the cohort there were still many things members had not shared with each other that relate to their leadership. Decreasing this private area would require increased disclosure within the group over time.

Comparing self-assessment and peer feedback. An interesting observation evident when comparing the SJTLPR and SJTLSA responses is the rating of school context. Peer reviewers consistently rated their school context more positively than did cohort members. Keeping in mind that almost one third of the peer reviewers were principals or vice-principals, this score may reflect a difference of perspective on leadership in the school. Administrators have a broader perspective of what is going on in the school compared to individual teachers whose responses are likely based on their own

particular experience. Both perspectives however are revealing and informative. Distributed leadership perceived only by administration may relate to strategies and processes they have put in place to ensure participation and input from staff. The authenticity of those processes may be questioned by teachers, who find they have little real decision-making power. Some of the practices listed, such as adopting an asset perspective (item 76), questioning longstanding practice (item 80) or shared leadership (item 84) should be fairly clear to all involved, but there was little consensus on those items (see p. 188 for specific items on the parallel SJTLISA tool).

Impact of peer feedback. Cohort members appreciated the opportunity to receive peer feedback. According to participants, peer feedback from colleagues beyond the cohort helped them reflect, kept them honest and gave them a reminder of the reality that existed outside of the cohort. Because of this it supported self-reflection and goal setting. They appreciated the strength-based approach and the fact that the strategies used to process the feedback were interactive and had an element of choice. Many people found that the peer feedback provided confirmation of their self-assessment. For others the peer feedback raised questions, for example, about different perspectives on school culture: “The peer-reflection was very meaningful ... reaffirmed the things I believed I was doing well... highlighted an area where they believed that I needed to improve upon” (Participant N, Journal Session Three). Most of the group members found that debriefing verbally with a partner afterwards was a supportive process and helped validate their perceptions.

Informal peer feedback. Additional peer feedback was received spontaneously after people facilitated cohort activities and in the subsequent session when participants

had a chance to read the summary of participant feedback on the specific learning experience they facilitated. Sharing circles were another opportunity to receive peer feedback, as people often thanked each other for specific individual contributions. As the sessions progressed, I noticed with pleasure that appreciative comments were more often directed towards other cohort members than myself. This affirmation contributed to building and strengthening the relationships within the cohort and also reflected an increased awareness of the contributions of each individual to the group. Participants were asked to reflect on the peer feedback processes during Session Six, as part of the carousel activity.

Carousel chart responses on peer feedback. The feedback cohort members received from their peers assisted with the reflection process and served as a kind of touchstone to compare with their self-perception, if it was rigorous and honest. For some members the peer feedback reaffirmed their own ideas, kept them realistic and served as a check and balance by reminding them of the ideas “out there” beyond the cohort. Gaining feedback from other cohort members helped them to focus on their personal strengths and gifts. The feedback from cohort members was encouraging, uplifting and normalized their beliefs, allowing them to recognize that they were “not crazy”. This carousel chart summative experience was designed to be dialogic and reflective. At the core of this and most other cohort learning experiences was the focus on critical reflection.

Element Seven. Critical Reflection

Critical reflection, as mentioned earlier, was the cornerstone of the leadership development model. During leadership development sessions, critical reflection was

facilitated through journal writing, dialogue and action research cycles. Peer reflections and self-assessment provided content to reflect upon and learning-focused conversations provided a process by which critical reflection could occur. Critical reflection was also deepened through engagement with critical content in readings, videos and presentations by members of the cohort. The purpose of critical reflection is to deepen one's understanding. Processes used throughout leadership development sessions supported participants in reflecting *on action* through action research cycles and *in action* through reflecting on activities of the cohort (Argyris & Schön, 1974). Processes used included oral, written, visual, and both formal and informal structures. One of the strongest supports for critical reflection was its reciprocal and symbiotic nature. The cohort grew together through reflection and the closeness of those relationships facilitated the process of critical reflection. In the next section I present the second theme that was developed over the course of the leadership development sessions with input from cohort members.

Adult Learning

The theme of adult learning goes beyond the seven elements described thus far and provides additional detail on how the seven elements discussed in this chapter were experienced by cohort members. The theme of adult learning focuses on participants' perceptions of how they learn best and processes of adult learning incorporated into leadership development sessions.

Participants' perceptions of how they learn best. Learning for the cohort members involved asking questions and raising issues, engaging fully in learning experiences and expanding awareness of issues of social justice. Opportunities to inquire

into leadership practices through problem solving with the help of others were seen as beneficial and desirable:

It is valued that our sessions together are learning sessions that support us professionally. The content we explore is modelled in our sessions taking it from theoretical to practical (i.e. AR cycles, Premises and Practices for Leading small groups etc.). (Participant S, Theme Feedback, January 8, 2013)

The structures used to vary groupings and allow for partner and small group conversations were seen as helpful ways to get to know one another, and ourselves, on a deeper level. Opportunities to hear new ideas and perspectives were viewed as valuable learning opportunities. Cohort members appreciated it when resources were on display and were available to be borrowed.

Attending to balance and design. Facilitating leadership development sessions required structured design including effective strategies and structures for managing group work. The principle of diamond design (Lipton & Wellman, 2011b) is a particular approach to use when facilitating groups. The premise is that learning experiences should begin and end with individual tasks and expand to small, and large group tasks in the middle of the process. Beginning with individual written reflection before proceeding to small group work provides safety for participants. Expanding to dyads or triads before a large group formation, maximizes talk time while reducing risk. Large group discussion facilitates concept development as small groups share highlights of their discussion. Finally, closing the diamond requires individual reflective writing time so individuals can synthesize and decide on application and determine personal relevance. Research

participants valued the time facilitated during sessions to reflect on their work through reading, writing and small group work.

Facilitation challenges. They felt challenges for the facilitator included the time available, pacing, planning for movement and ambitious session agendas. Participants advised me to simplify the focus and maintain flexibility during sessions. During Session Four in particular, I made a deliberate attempt to slow down which was noted and appreciated; there was also coincidentally an overall decrease during Session Four in the amount of facilitation required by the group. Responsive facilitation was required to incorporate diamond design, manage time effectively and adapt agendas to the perceived needs of the group and in response to written, verbal and non-verbal feedback. Dilemmas cohort members perceived for the facilitator of large group conversations included when to intervene, and whether to invite individuals who hadn't spoken to participate. As a facilitator I also struggled with balancing pressure and support for cohort members who were not volunteering for learning-focused conversations.

Breaks. Meaningful conversation took place during all breaks during the leadership development sessions. Cohort members took advantage of the opportunities to network around social justice issues, follow-up on previous conversations and seek advice. When large group conversations developed such as during lunch, there was no formal leader identified, though often informal leaders emerged who had specific experience or expertise in the topic. Incorporating a sense of fun and enjoyment in the leadership development sessions through facilitated activity breaks contributed to the wellness of research participants.

Design frame. The design frame (Figure 8) which guided the leadership development sessions was introduced and shared with the cohort during the first leadership development session. When the design frame for the leadership development sessions was revisited in Session Four, participants confirmed that previous leadership development sessions had reflected the principles and priorities articulated. Research participants also indicated they were comfortable with using the design frame as originally written, to guide subsequent sessions with the cohort.

Processes of adult learning. Over the course of the sessions, participants had the opportunity to engage in particular activities more than once, including self-assessment, journaling, dialogue, action research, learning-focused conversations, critical conversations and participating in peer reflection.

Self-Assessment. Completing the self-assessment was a valuable reflection tool that helped identify a starting point. Conversation stimulated by specific school culture items in the SJTLSA, fostered participants' interests in learning more about the creation and recreation of school culture. The SJTLSA also had impact outside of the cohort, as specific items were shared with colleagues and administrators as potential conversation starters. Individual members of the cohort indicated they were facing particular challenges in their school environment by writing in new questions to the self-assessment tool or voicing them during discussions. Participants indicated that the SJTLSA made learning visible for participants, allowed them to see where they were applying what they had learned in their practice, identified tensions in their work and made personal connections clearer. When cohort members completed the SJTLSA for the second time, there was more similarity in their responses, many more "strongly agree" rankings, and

the mean scores increased in all sections except Leadership Skills and School Culture.

The action research section of the SJTLSA identified new areas of focus such as using paraphrasing, facilitating shared leadership and recognizing the need for varied learning styles.

Reflective journaling. Participants appreciated having opportunities to do reflective journaling; the act of writing released energy, increased focus, facilitated problem solving and captured experiences, observations, insights and emotions. Reading the journals allowed the researcher to gain insight into the private thoughts, experiences and responses of participants, some of which they chose not to share with the larger group. When people were given a specific focus and prompts for their reflective journaling, their responses were stronger and more focused. Having an opportunity to engage, on a regular basis, in critical and personal reflection was seen as particularly valuable and important. Participants valued having extended periods of time to write in their journals and asked that those opportunities continue in subsequent sessions. For some participants, journal writing captured their feelings of self-doubt. Writing in their journals seemed to provide cohort members with emotional release or “therapy”, the tension in the room always decreased after journal writing time was provided. Cohort members appreciated the time to be able to focus on their action research, record what they had done and reflect on what they had experienced. The private nature of the journals was appreciated, contents were not always shared or were selectively shared which provided safety for participants to record thoughts they were not prepared to discuss with the larger group.

Dialogue. Cohort members appreciated the opportunity to dialogue with others, many found the partner and small group discussions valuable because they provided an

opportunity to get to know themselves and others better through authentic conversations. They found they were inspired and invigorated by the responses, were able to share common themes and frustrations, felt validated and discovered the impact of their collective work.

Action research. The way in which the action research was introduced, and being a participant in an action research study, increased comfort and understanding of the action research process. As participants engaged in action research, they found the action research aspect of the study helped them to think through their change initiatives, monitor their progress and identify and overcome roadblocks. Cohort members were able to make observations about shifts in focus, roles, attitudes, emotions and the rate of change. When additional focus was placed on stating clear questions and using varied data sources and collection tools, participants' action research cycles showed marked improvement in these areas. For one participant it was very significant to learn that acquiring new knowledge to support leadership could be the focus for an action research cycle. Cohort members indicated that their understanding of their action research was deepened as a result of partner conversations which incorporated paraphrasing and active listening strategies. Cohort members found it very helpful to talk with a partner about their action research especially when their partner used the skills of a learning-focused conversation. The partner dialogue seemed to be much more effective in taking people deeper into their research than large group sharing of experiences. Almost all participants used three different forms of data collection and had a good grasp of the AR process. Although not all AR cycles had each component well developed, each participant in the cohort submitted complete AR cycles over the course of the study that did indeed have all four

components well developed. In Session Six, when writing about their action research, cohort members focused on all four stages in the action research cycle.

Learning-focused conversations. Opportunities to do goal setting occurred during learning-focused conversations. Cohort members had the opportunity to engage in learning-focused conversations with me between cohort sessions. Between the fourth and fifth sessions seven of nine cohort members participated in such conversations. It was clear to me that cohort members had made considerable progress between these conversations and the next cohort session. This was supported with a brief entry in my journal during the fifth session: “Growth since LFCs – really increased depth!” It might be interesting to see whether the same amount of growth occurred after partner conversations, though this would be harder to track. When leading learning-focused conversations cohort members were able to pose strong questions, promote critical thinking and help others identify their next steps.

Critical conversations. Cohort members appreciated the opportunity to practice the skills of critical conversations (Patterson et al., 2002) using common scenarios initially and then scenarios more closely related to the challenges they were facing in their leadership work for social justice. They found it was important to prepare carefully for the conversations and to practice and receive feedback. Engaging in critical conversations can be very intense and cohort members agreed that it was a good idea to have an exit strategy prepared before engaging in a challenging conversation.

Peer reflection. Readyng cohort members to receive peer feedback required careful planning to ensure they were relaxed, comfortable and open to receiving the feedback. Not all cohort members found the peer reflection process helpful; those who

did find their peer responses confirmed their self-assessment and helped them identify personal goals. The interactive nature of the process helped them gain insight into themselves and their colleagues. Cohort members who did not find the peer reflection process helpful were seeking more critical responses from their colleagues.

Conceptual Model for Research Question Two

Each of the elements of the leadership development model which have been discussed in this chapter made a strong contribution to cohort sessions and participants' learning. Table 43 synthesizes the major contributions of each element organized under the consistent categories of purpose, function and impact. Running vertically along the left side of the table is the content of the second theme that emerged from the study: Adult learners, balance and design. These factors ran like threads through all of the elements and describe the considerations taken into account when combining, sequencing and selecting how to incorporate the elements into the cohort sessions. Figure 39 synthesizes the major contributions of each element of the leadership development model into one graphic.

Table 43

Purpose, Function and Impact of Elements of Leadership Development Model

	Element	Purpose	Function	Impact
Adult Learners, Balance and Design	Journaling	Critical Reflection	Download information Activate prior knowledge Increase safety Mnemonic device Facilitate transitions Critical thinking Synthesis Differentiation / individualization	<i>Participants</i> Emotional outlet Private space Space and focus for critical reflection Mnemonic device
				<i>Researcher</i> Calm Focus Transition
	Participant Action Research Cycles	Job-embedded learning Application of content Problem-based learning	Continuous engagement in action research process Articulate area of focus Select appropriate strategies Data collection Data analysis and findings	<i>Participants</i> Learn action research process Develop and refine area of focus Monitor growth and change Improve practice
				<i>Researcher</i> Accountability Feedback Capacity and agency
	LFCs with Researcher	Strengthen reflective capacity	Find direction Problem solve Introduce principle of practice Introduce third point Provide information	<i>Participants</i> Clarify focus Determine process Develop concepts Develop insights

	(Table continued)		Collaborate Coach Set goals Anticipate changed state Identify next steps Summarize	Develop agency Debrief experiences Share emotions <i>Researcher</i> Articulate thoughts Envision change Make decisions Identify next steps
Adult Learners, Balance and Design	LFCs with Cohort Members	Develop facilitation skills	Facilitate critical reflection on action research Pose good reflective questions Paraphrase Help partner envision changed state Help partner identify next steps Ask partner to summarize	<i>Participant Facilitators</i> Active listening skills Paraphrasing Goal setting Summarizing
	Researcher Reflections on LFCs	Gather thoughts on LFCs and facilitation skills	Ponder alternatives Reflect on research process Reflect on facilitation of cohort Critique LFCs Reflect on cohort itself	<i>Researcher</i> Exploratory thinking Clarify focus Assess value of on-site LFCs Learn about participant contexts Capture emotions Reflect on cohort
	Dialogue	Process ideas, content and experiences	<i>Participants</i> Share common experience Meaningful conversation with like-minded peers Troubleshoot Ask questions Critical reflection Problem solving	Process experience and content Connect theory and practice Share experiences Know self and others better Be inspired and invigorated Identify common interests Feel validated Provide emotional support (Table continues)

	(Table continued)		<p><i>Researcher</i></p> <p>Provide choice Create disequilibrium Find shared purpose Structured and semi-structured interaction Partner, small and large group conversation</p>	<p>Learn to question Gain insight into change process</p>
Adult Learners, Balance and Design	Self-Assessment	Enhance self-awareness and critical reflection Determine personal action research focus	Identified as teacher leaders and change agents Reflected on attitudes and practices Interactive	<p><i>Participants</i></p> <p>Facilitated dialogue and self-reflection Identified strengths and weaknesses Personally relevant Gained perspective Raised new questions</p>
				<p><i>Researcher</i></p> <p>Identified leadership roles and issues Identified skill levels, concerns, goals</p>
	Peer Feedback	Provide insight into how leadership is perceived by others	Balanced self-assessment Raised questions Interactive process Positive feedback appreciated Identified personal attributes Different perspective on school context Supported self-reflection and goal setting	Kept participants honest and realistic Provided check and balance to self-assessment Focused on personal attributes Normalized beliefs
Critical Reflection	Transformative learning	Reflect on action Reflect in action Reciprocal Symbiotic	Deepen understanding Transformative learning	



Figure 39. Contributions of each element of the leadership development model.

Summary of Chapter Eight

In this chapter I have focused on the elements of the leadership development model that assisted teacher leaders in acquiring the knowledge, skills and dispositions to be critical change agents in schools. In the next chapter I turn my focus to the impact of the cohort itself in this learning process. I explore how participating in a co-constructed community of practice supported teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice.

Chapter Nine: Co-Constructed Cohort Community

Chapter Nine Overview

Chapter Eight focused on the elements of the leadership development model that contributed to teacher leaders becoming critical change agents for social justice in their schools. In this chapter, detailed findings are presented in response to research question three which asks: “How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice?” In this chapter I begin by defining a co-constructed community and its significance in the research question. I then explore the cohort processes found to be productive in developing the agency of participating teacher leaders. Third, I share those elements of the theme Cohort as Community, which describe the participants, the group, its evolution over time and the impact of the cohort community on participants. This theme emerged from the analysis of data during the research process, refined and revised with input from the research participants. Findings shared in this chapter have emerged from a cross examination of the multiple data sources shown in Table 44 and extending across all six leadership development sessions.

Co-Constructing Community

Critical reflection through dialogue with a group of peers can strengthen a community. As one of the intentions of the research study was to co-construct a community whose members could provide each other with support, challenge and vision (Lipton & Wellman, 2003), group dialogue clearly played a substantive role in that process. Grumet (1995) states that curriculum is “the conversation that makes sense of things... It is the process of making sense with a group of people of the systems that

Table 44

Data Forms and Sources by Session for Research Question Three

Data Forms	Data Sources by Session						
	S1-S6	1	2	3	4	5	6
Observations	Video and Audiotaped sessions Researcher Reflections Field Notes						
Interviews	Participant Reflections Learning Focused Conversations (video S1, audio S1-S6)		Conversations with Critical Friends	Conversations with Critical Friends			Self-Assessment Reflections (SARs)
Artifacts	Researcher: <ul style="list-style-type: none"> Facilitation Guide Researcher Checklists LFC Questions Researcher Journal 						
	Prepared Session Materials: <ul style="list-style-type: none"> Agendas Logic Models Action Research Cycles Themes 	Design Frame Conceptual Model Carousel Chart Questions	Lambert Article	Strengths and Stretches	3 Articles Fierce Conversation handouts	Role play Scenarios Johari’s Window SJ Lens Template	Carousel Chart Questions
	Materials collected during sessions	Carousel Chart Responses		Image Theatre Handout Group Profile	Article Presentation Charts		Carousel Chart Responses
	Participants: <ul style="list-style-type: none"> Participant journals Participant Action Research Cycles Emails 	SJTLSA’s	Theme Feedback	Theme Feedback Peer Reflections (SJTLPRs) Strengths and Stretches	Theme Feedback Peer Reflections	SJTLPRs Valentines Johari’s Window completed SJ Lens completed	SJTLSAs

Note: Data sources informing findings for research question three are in bold blue font.

shape and organize the world we can think about together” (p. 19). In this chapter I focus on the “curriculum” I used in the co-construction of a cohort community and the cohort processes that were effective. In the design frame for the study, which I shared with participants on the first day, I selected Block’s vision of community to articulate the vision for the cohort:

Community offers the promise of belonging and calls for us to acknowledge our interdependence. To belong is to act as an investor, owner, and creator of this place. To be welcome, even if we are strangers. As if we came to the right place and are affirmed for that choice. (Block, 2008, p. 3)

I felt this quote really captured the nature of the cohort community I hoped to co-construct with participants based on a sense of belonging, connection and interdependence.

A co-constructed community suggests that communities do not form by decree, bringing together a group of teacher leaders for six full day sessions did not create a community, merely the potential for one to develop. Co-constructing a community takes deliberate focus and attention to the nature of the group and to resolving interpersonal issues as they arise. It also requires sharing power amongst group members for making decisions and facilitating sessions.

Kegan’s (2000) constructive-developmental theory, on which Drago-Severson (2009) bases her adult learning framework, identifies five developmental ways of knowing. This research study focuses on individuals in the top two stages: institutional self-authoring and inter-individual self-transforming. Self-authoring individuals focus on their reflective self and are interested in making sure their actions reflect their personal

beliefs. Participants scrutinize and challenge themselves to engage in ethical leadership. Self-transforming individuals are open to self-exploration and learning from other people. Self-transforming individuals embrace conflict as natural and a way “to let others inform and shape thinking” (Drago-Severson, 2009, p. 40). Participants’ self-authoring and self-transforming qualities enhanced the depth of dialogue and helped build community.

Productive Cohort Processes

In this section I describe the seven processes I found to be productive when working with the TLSJ cohort and the components and benefits of each process. The seven processes are: sharing facilitation, sharing learning, sharing feedback, profiling group dynamics, participant reflections, sharing circles and activity breaks. In Figure 40 co-constructing community is at the centre of these processes because it is the focal point and unifying theme for all of the other processes.

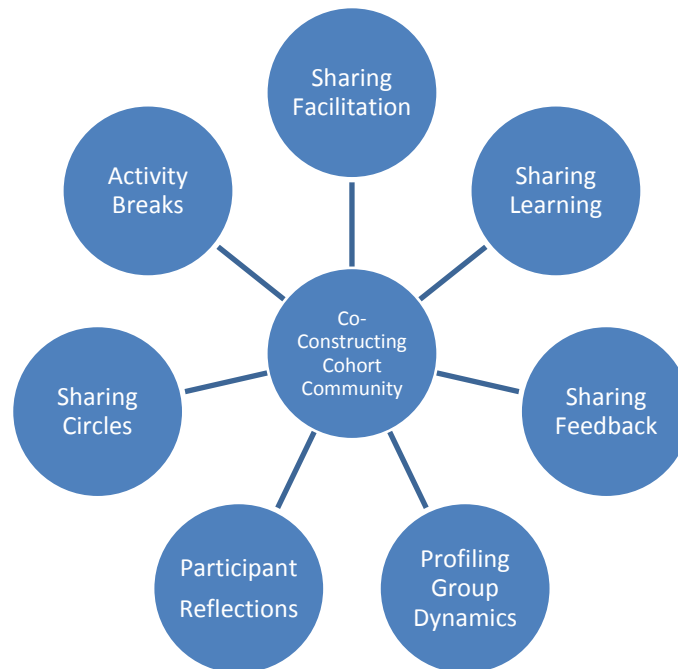


Figure 40. Productive cohort processes for co-constructing community.

Sharing facilitation. One of the ways in which the cohort was co-constructed was by sharing the facilitation of sessions. While I made all decisions for the first session, as the sessions proceeded, more and more decisions were taken by the group and more of the facilitation was done by cohort participants. Sharing the floor was a concrete way to share power within the group and a visible reminder that the cohort was to be a collective endeavour even though the research was of my own design. Initially members of the group were invited individually to share something particular with the group that I was aware they had to offer. Gradually though the power shifted to individuals suggesting topics or strategies and either volunteering to present or accepting once approached. By the end of the cohort sessions, each member had provided either formal or informal leadership within the group. Some of the facilitation was prepared especially for the cohort, such as fierce conversations or image theater, while other members shared projects they had completed with students using photography, poetry and video to address cultural diversity and issues of homophobia. In one particularly moving session, a participant shared a piece of feedback received after a group of students had run a session for their peers on creating a safe school community for LGBTQ students. The note said: “I’m gay. I’m glad you had this presentation but I’m still scared to come out.” One month later that student not only came out in the school but addressed the school board and asked them what they were going to do to ensure his safety. For this participant, “What was most exciting was when the Board said they could no longer ignore us. Watching that courage was the most inspiring, watching that person just lay it out there. You can’t run away, I am sitting right here. This person exists in your school ... And you are responsible for their safety” (Participant R, Session Two).

Sharing learning. Another strategy to build on the strengths of individual members of the cohort and co-construct a strong community was to invite individual members to share what they were learning in their university courses which included action research, social justice pedagogy and mentoring. The willingness to share emerging insights from coursework was appreciated: “The comfort level to share our knowledge and experience with one another contributed to the richness of learning among the group” (Participant N, Written Feedback, May 30, 2013).

Experiential learning was also shared with the group. One member shared what he had learned by organizing a mentoring program for students in a middle years' school, another narrated slides from a recent trip to Kenya with a group of students on a Me to We (Metowe.com) service learning trip. A third member shared what she learned by creating a medicine garden and mural with a group of Aboriginal youth leaders and students in special education. “One of the reasons I do them is so our students have a physical presence. ... Trying to build that inclusivity and make them feel safe and welcome. ... Part of it is just to build community” (Participant M, Session Five Transcript, February 14, 2013). One of the reasons group members felt comfortable stepping forward to present to the group was the support and feedback they received from the group.

Sharing feedback. As described in research question two under peer feedback, the practice of writing and distributing Valentines provided cohort members with an opportunity to share their appreciation for each other in writing. For some participants this feedback was more meaningful than what they received from the SJTLPR because it was from people they knew understood their passion and provided detailed and specific

feedback. Participants reported that peer feedback from within the cohort allowed them to focus on their individual gifts and strengths and they found it very encouraging. The compliments below are composites assembled for each cohort member from the nine Valentines each received (Session Five Summary, February 14, 2013). One of the nine members of the cohort is valued for:

- Being positive, comfortable to be with, affirming, relentless and humble.
- Gentle wisdom, being calm, observant and passionate about kids.
- Being deep, positive, and reflective and posing difficult questions.
- Gently bringing positive energy, laughter and activity to the group.
- Being compassionate, honest, optimistic, passionate and committed.
- Being contemplative, brave, honest, committed, generous and positive.
- Being open, honest, direct, passionate, an advocate and knowledgeable.
- Being positive, honest, generous, inclusive, articulate and passionate.
- Being knowledgeable, committed, vulnerable, generous and passionate.

The most common attributes valued by the group that emerge from the above list are being passionate, positive, optimistic, committed, knowledgeable and generous. Not surprisingly these are also attributes listed to describe the qualities of teacher leaders for social justice. Another way in which members came to know the characteristics of the group was during Session Three, when we explored the dynamics of our group and created a group profile.

Profiling group dynamics. Session Three focused on the characteristics of effective groups and predictable dynamics in groups (Lipton & Wellman, 2011b).

Learning how effective groups function provided participants with the language to talk

about group interactions. The purpose of the “Predictable Dynamics in Groups Activity” (Lipton & Wellman, 2011b) was to create a group profile of our behaviours and discuss the responsibilities of a leader with regards to group dynamics. Each person was asked to describe their behaviour in groups by rating themselves along four continuums ranging from task to relationship, certainty to ambiguity, detail to big picture, and autonomy to collaboration. When we looked at our group profile, cohort members noted the group was heavily weighted on the task, certainty and big picture sides, and equally distributed between autonomy and collaboration. Noticing that there were few people in the group who fell on the relationship side, we decided we might need to deliberately attend to relationship dynamics within the group. Learning about effective groups and the group’s profile helped members understand themselves and each other better and maximize the diverse skills and talents for the benefit of the cohort. Building upon this newly acquired knowledge of group dynamics and effective groups in Session Three, I began asking participants to record their observations on the group and their participation within it as part of their participant reflections.

Participant reflections. Feedback from participants consistently indicated that the cohort itself was a valuable component of the research. Positive perceptions of the group were confirmed by participants. In feedback submitted after four of six sessions, participants confirmed that other cohort members were making critical contributions to their learning. While the participant reflections were valuable in gathering participants’ responses to learning activities, I found the strategy of sharing circles to be more effective in gathering participants’ emotional responses.

Sharing circles. Sessions Three to Six ended with a group sharing circle.

Sometimes we passed around a talking stick; other times we just spoke, usually but not exclusively, in rotation. The circle brought each day to a close in a way which was calm, personal and inclusive. After the initial Session Three circle, there were no prompts given and cohort members were free to talk about whatever they wished. During the sharing circle people shared their perceptions of the learning environment we created and the value of meeting the others. Four themes capture the content of the sharing circles: people and relationships, valued content, valued processes and the culture of the cohort.

Members of the group commented on how much they valued the individual members of the cohort, their openness and willingness to take risks. The diversity of the group was appreciated and very often people were thanked for specific individual contributions: “Thank-you for bringing the intensity.” “I can’t believe I made you cry.” “It was good I needed to trouble shoot that. Thank-you both. And for giving me strategies to handle that. That was really important. Thank-you” (Participants J, K & T, Sharing Circle, Session Five). They appreciated the opportunity to engage in intense and honest dialogue with a diverse group of individuals who offered input and provided support: “I am feeling so grateful. I have been asked to be in a leadership role which is new for me ... To have a venue to reflect on that process and some of the frameworks surrounding it is so important. Really important. I appreciate it a lot” (Participant J, Session Three).

Cohort members valued practical leadership strategies such as characteristics of effective groups, paraphrasing and fierce conversation role play. Receiving feedback through conversations and Valentines helped people reach new insights and the frameworks were valued for building upon experience and intuition. Processes that were

appreciated included varying the size and composition of groups, allocating time for thinking, writing and critical personal reflection, and having opportunities to contribute to the sessions.

The culture of the cohort and learning environment was captured in comments like “an awesome experience”, “an amazing experience”, “I love it here”, “I want to keep doing this”, “Can’t we just keep doing this for a number of years?”, “I can’t say enough good things about it”, “I am glad to hear this isn’t the last one” and “I think it’s great. Thank-you” (Session Six Summary, p. 18). People valued the feeling of safety, the space to be vulnerable, and the inspiration of the group: “It’s nice to have a group of people who are all on the same page. You just know that I am not crazy, everybody here is on the same page and is thinking the same thing. It is nice to have that affirmation” (Session Six Summary, p. 18). They found they looked forward to cohort sessions as “joyful, enjoyable, safe, nurturing, comfortable and a reprieve” (Session Five Summary, p. 8). The positive environment of like-minded peers allowed them to share their passions and strengths. The culture created by the group was described by one participant as “a lovely one” similar to the closeness you feel after sharing something very intensely with a small group of people, like at summer camp. One member described it as a “safe space”, “like rehab”, in which it was okay to “face all your insecurities and faults” without feeling judged (Session Six Summary pp. 18-19). Another said she had come to understand over the sessions the significance of the quote on community (Block, 2008) I had included on the cover page of their binder and at the beginning of this chapter.

The sharing circle was confirmed as an effective closing strategy for each session which provided every member of the group with an opportunity to speak. Cohort

members embraced the circle as an opportunity to share feelings and experiences about the session or the cohort as a whole, and also express gratitude to other members of the group. As a ritual we followed each session, the sharing circle brought a sense of calm to the group because it was inclusive, supportive and personal. The observations shared during the sharing circles were of a different more personal quality than the written participant reflections. They were spontaneous, individual, and more revealing than the written comments. I believe as a result, the sharing circles contributed to building a stronger cohort community. One final strategy which helped build community was our activity breaks.

Activity breaks. In their written feedback after Session One, participants asked that more movement be included in subsequent sessions. One of the cohort members coincidentally offered to facilitate quick team building movement activities in future sessions. I happily accepted the offer and these fun movement activities became an integral part of leadership development sessions. Not only was the physical movement appreciated but also the chance to laugh and have fun together: “Enjoyed the cup game, the movement and energy is a good way to loosen up and brings the group together” (Participant Reflection Summary, Session Three, p. 2). The activities were excellent examples of team building exercises which required little advance preparation and reaped large benefits. The cohort member who shared the activities described how he used the strategies to build positive culture with middle years students. Unfortunately although I scheduled one, I did not make time for an activity break during Session Four and in Session Five the member who designed the activities was ill and unable to attend. The absence of the movement breaks was noted by cohort members on their feedback sheets

so they were brought back to much acclaim in Session Six. This was an unanticipated aspect of the leadership development model which I would include in future iterations. It is important to move, to have fun and to laugh!

The activity breaks seem to fit the description of carnival described by Shields and Edwards (2005), when the regular rules of interaction are suspended such as during school spirit days or staff retreats. On these occasions the usual trappings of hierarchy including titles, roles and distinct clothing may be suspended and individuals interact according to different altered expectations. According to Shields and Edwards, carnival can strengthen the honesty of dialogue among group members by transforming expectations:

Carnival, by its very nature, does not permit fear. Its laughter is genuine, not tinged with fear, but expansive and liberating. ... Carnival is change and flexibility; it is the unanticipated, the unusual, the unexpected. It brings to the fore a new conception of space and time, of relationships and interactions. (p. 147)

By suspending normal expectations and patterns of interaction, carnival can actually strengthen dialogue, “Carnival establishes the conditions in which dialogic relations may more fully be understood and developed, in which new ways of relating are introduced and subsequently sustained” (p. 148). The activity breaks functioned as carnival for the group, different skills were valued during each activity and they were entirely non-verbal active tasks in contrast to the extensive time spent in dialogue. The laughter and camaraderie expressed during the activity breaks provided us with an opportunity to see each other differently and come to understand each other’s diversity. This enhanced

understanding of each other's individuality strengthened our relationships and subsequently our dialogue.

Co-constructing cohort community. Laughter, conversation, sharing confidences and successes, seeking support when things are challenging are all important elements of a community. Lipton and Wellman (2011b) describe the nature and value of learning communities:

Collaborative groups create shared knowledge about teaching and learning based on their individual and collective experiences, they communicate new understandings and develop shared meaning. We also learn about ourselves, our colleagues, our group and what it means to be an effective group and group member. (p. 9)

Over the six months we were together, participants said they had more in depth meaningful conversations with people in the cohort than they had throughout their working careers: "If I add up all the conversations I have had with all my colleagues, I have had more conversation with each of you than with my colleagues" (Participant T, Validation Session). This is a significant observation. Ideally and frequently working on a teaching staff is characterized by positive relationships between colleagues. Evidence of these positive relationships may include exchanging pleasantries, inquiring about one's family members or casual conversations about completing report cards or units being taught. Collegiality is different. Truly collegial relationships are characterized by challenging and meaningful conversations in which people are comfortable enough to share their vulnerabilities and insecurities about their work. Dialogue that is intensely challenging and focused on critical reflection and improvement is not merely

congratulatory or superficial. People ponder deeper questions such as their purposes as educators and what should be done that really matters. Relationships in the cohort were truly collegial and authentic. There was no posturing, rarely any holding back, and members shared very deep and personal emotions.

Collegiality is a rare find in education circles. Sometimes it may come through involvement in a professional association, during coursework, or perhaps as part of a cohort of teachers working closely together on a particular initiative. For these teacher leaders in Manitoba working on issues of social justice, finding a group of peers with which to engage in these deep and meaningful conversations was invaluable. Participants remarked on every feedback sheet and in every sharing circle on the incredible intensity, support and inspiration they felt from the group. They frequently commented on how group members “Got it” or “I don’t have to explain”. Communities of practice (COPs) (Lave & Wenger, 1991) evolve over time through repeated interactions, shared experience and dialogue in a group of colleagues who share a common area of expertise. COPs have the potential to support individual growth and also generate ideas that are greater than what any individual could imagine. This capacity for synergy is what was envisioned for the cohort and what actually occurred.

The complexity of cohort sessions can also be explained by complexity theory. At any one point in the study there was an interaction of interpersonal dynamics, content knowledge, skill acquisition, personal reflection and shared visions regarding social justice. Unseen dynamics included all of our sociocultural histories, linguistic understandings, and interpretations and power dynamics present within any group. Determining the impact and contribution of each aspect of the study to participants’

learning is difficult at best, impossible at its most challenging. The unit which was at the heart of all of this was clearly however the cohort itself.

Co-constructing a community means that all the decisions about how a community learns to grow through their work together are shared. As facilitator of the cohort I made decisions around the agenda, scheduled routine activities and provided structure in the design to ensure interaction and balance throughout each day. Yet I sought input into each session from the group, solicited feedback during the day regarding pacing and amendments to the agenda, and reflected carefully on the feedback shared through participant reflections. I consider the cohort co-constructed because its unique character was determined by the combination and contributions of the individuals who made up the group. It was their willingness to enter so fully into whatever was planned for and with the group that made it successful. Good design can make those outcomes more likely but nothing will be successful in building community if the participants do not invest of themselves in significant and personal ways. Contributions and suggestions from cohort members led to some of the most successful activities for the cohort including activity breaks, sharing circles, diverse and frequent partnering strategies, more time spent on journal writing and in learning-focused conversations, forum theater and fierce conversations, and relaxing the pace. Without the thoughtful and brutally honest reflections and feedback of cohort members, the cohort itself would not have evolved into such a strong, challenging and supportive community. In the second part of this chapter I share the third theme, Cohort as Community, which developed through the cohort sessions and was strengthened through the input and feedback of cohort members.

Cohort as Community

Findings from the analysis of the data sources analyzed for research question three (Table 44) revealed the strong cohort emerged as a consequence of the unique combination of individuals that made up the group, qualities of the cohort group and the experiences they shared. Participants are described here as they form part of the themeing on the topic of cohort as community. Also, the individual characteristics of participants impacted the cohort as a whole and how research participants experienced the cohort community. This final section of findings for research question three considers the qualities of individual participants, qualities of the group itself, shifts in the cohort over time and the impact on cohort members of participating in a co-constructed community.

Participant qualities. Each individual participant in the cohort brought strengths and interests to the group and made unique contributions. The comments below were gathered from my researcher reflections recorded throughout the study and reflect some of these unique qualities.

Participant G. Participant G was very task oriented and became more relaxed and assertive as time went by. She is passionate about social justice and student empowerment. She volunteered to present on fierce conversations and used personal examples to make it relevant. She had a wonderful opportunity during the research to apply what she was learning when she travelled as group leader and facilitator to Kenya with a group of students for ten days. She was willing to seek advice and be vulnerable with the group; she demonstrated intense focus while doing her self-reflections.

Participant J. Participant J joined the cohort at Session Three and quickly became a strong addition to the group. She is passionate about literacy education, inclusion, equity

for English as an Additional Language (EAL) learners, social justice and leadership. She was open and honest with the group and willing to be vulnerable in sharing her data analysis and learning and receiving feedback when engaging in fierce conversations.

Participant K. Participant K focused on advocacy and shows great concern for students. Participant K often felt guilty about her action research yet was motivated and engaged through her return to university in search of theory to support her practice. She demonstrated strong leadership in the area of LGBTTTQ inclusion. Her passion and energy returned in Session Six where she committed to strengthening LGBTTTQ inclusive environments in her division. She adopted a long range perspective and articulated a specific plan for creating change.

Participant L. Participant L began the research feeling very insecure about her leadership and quietly gained strength and confidence as the sessions progressed. She felt strongly about the impact of action research and pursued it through a university course. Over time she came to value her quiet approach. L has a strong focus on inclusion and was very focused during self-assessment and reflective activities. She contributed the sharing circle, talking stick and a helpful hand during group activities. For L, the dialogue and cohort were significant experiences.

Participant M. Participant M struggled to maintain a positive outlook throughout the research due to personal health concerns. She was able to use the action research framework to find a focus for her work in the school. While initially quite frustrated and discouraged in her work, she became more optimistic in subsequent sessions. She was happy to have a colleague join the group and seemed happy to be a mentor. She found individual conversations such as LFCs as well as frameworks very helpful and was

generous in sharing her knowledge of Aboriginal culture particularly around the significance of circles and the talking stick. Participant M is highly committed to creating inclusive communities.

Participant N. Participant N was a very quiet member of the group who focused on improving his school's culture. While initially quite private, he showed in later sessions that he could be open and vulnerable with the group and share his frustrations. Participant N facilitated our activity breaks with enthusiasm. When talking about his own work he was confident and assertive, optimistic and humble. His focus became increasingly on developing leadership capacity in others, including his peers, as the study progressed.

Participant R. Participant R took initiative when asked early on to facilitate the group. He was very interested in learning-focused conversations and found they helped him maintain focus and direction. He made strong personal connections with other group members and was interested in sustaining those relationships beyond the cohort. He was very helpful with the logistics of the sessions and posed strong reflective questions. His new focus was on adopting varied leadership stances according to circumstances. He was aware he can be very intense yet also was able to reduce tension in the room by teasing.

Participant S. Participant S was a very hopeful participant. Her focus was on advocacy for students and colleagues particularly around issues of safety and inclusion. She gained confidence in herself as a leader as the study progressed. She was diligent and methodical in conducting her action research. Developing skills in conducting fierce conversations was very timely for her and closely related to the focus of her action research. She also was able to engage in light-hearted banter to defuse a tense atmosphere.

Participant T. Participant T was very task oriented and wanted to develop a stronger backbone to resist additional demands being placed on her in her school. She found action research to be a powerful tool in thinking through dilemmas she faced in her worksite where she focuses on rural education and social justice empowerment of students and colleagues. She seeks true collaborative relationships with other staff members and administration. As the study progressed and her return to part-time teaching left her with more energy for her research and cohort sessions, she observed that it also helped her to stay optimistic. Participant T facilitated image theatre with the group and realized the joker role was challenging. She too engaged in light-hearted teasing and stimulated the pace when necessary.

Researcher. As the researcher, I felt very lucky to have this group of participants in the research. Our time together was so valuable I regretted wasting time worrying about a non-functioning video camera during one session. I wrestled with how to support participants to focus on adults and take their initial steps to initiate their action research studies. I initially struggled with the feeling of giving up control of sessions as more members began facilitating sessions. In later sessions though I recognized that the sessions were still effective and I was much less fatigued when the load was shared. As the study progressed I saw myself as a bridge or connector between participants and various organizations in the province.

As a cohort composed of nine individual teacher leaders and one facilitator/researcher, the TLSJ cohort formed a tight and supportive group with shared characteristics.

Cohort group qualities. The cohort of teacher leaders included a range in years of teaching experience, grade level, school divisions and current and previous teaching positions. On a personal level, cohort members lived in various geographical locations in the province and share homes with children and adults of various ages and cultures. The group of teacher leaders was optimistic which means they expressed belief in the value of adopting positive attitudes towards change. Individuals entered the study with a wide range of experience and skills in their chosen leadership area and reflected a wide range of experiences which had contributed to their leadership skill set. This diversity of experience and context in the group was perceived by participants to be a strength of the cohort.

Members found each other to be self-sacrificing, passionate and committed risk-takers. They noticed others were like-minded, positive, optimistic and inspiring. Members were appreciated for being knowledgeable, open, generous and willing to share. As a group, the cohort felt inspired by each other. The group offered them a place to be vulnerable: “For me I think the group is a place of safety. When you have a place of safety bonding happens automatically within the group because you feel free to express whatever” (Participant M, Session Three). There was a high level of trust between members and individuals shared very personal experiences with the group. The supportive nature of the cohort seemed to develop in a very natural and organic fashion: “This process is kind of a planned intentional thing but it has also become very organic” (Participant R, COSL Conversation, Session Six); “Despite our roadblocks and frustrations, in the end there is a strength to reengage ... We know that our struggle will produce these feelings, but we carry on” (Participant R, Session Four Journal).

Cohort evolution. As sessions proceeded, the cohort felt more settled as a group. People volunteered to present, took pride in their work, sought advice and seized opportunities to apply their new skills. For example, when Participant G was preparing to go to Kenya she saw it as a chance to apply everything she had learned through the cohort and agreed to share her experience upon her return. Over the course of the sessions there were some shifts in the group that were noted by participants and myself. By the second session I was noticing people were taking more risks, sharing personal struggles and displaying more trust in each other which allowed them to be vulnerable. I also noted in Session Two that the dyadic relationships were being strengthened through partner conversations. There was very clear empathy displayed by group members and support for taking risks. By Session Three I felt there were strong bonds developing between group members. I also noted that was the first session in which participants felt comfortable enough to challenge each other, in that particular case on negative thinking.

As Sessions Four and Five proceeded I felt more and more that the group was independent of me and were developing their own relationships with each other. They solidified and consolidated their knowledge and skills. I reflected on these shifts after Session Five:

I was not in charge. I was not directing. ... It was a respectful sharing of the space. I wasn't giving up responsibility, it was an organic evolution of ideas.... I just opened up the process and got out of the way. ... The load is shared. I don't feel responsible for introducing topics ... they just come spontaneously and everybody participates in the conversation. (Session Five Researcher Reflection, February 14, 2013)

I was beginning to see the cohort as a community which shared leadership. This shift altered the climate during sessions:

This session the climate was different, it was as if we settled as a group. I was more relaxed as the facilitator, people took on more leadership roles and made more decisions. It felt like we were interacting on a different and deeper level of comfort in this session. (Researcher Reflections, February 14, 2013).

This observation of how the group evolved over time is consistent with Shields and Edwards' (2005) description of groups which engage in dialogue as understanding:

...as mutual understanding or respective horizons deepens, the depth of engagement by participants also deepens. Risk taking increases. Moving from the ground of certain knowledge to areas of uncertainty shifts participants beyond habituated truths and positional posturing into the creative ambiguity of possibilities and aspirations. (p. 87).

I recognized this sense of the group generating energy, possibilities and aspirations in my final comment after Session Five: "This could go on forever and I would like it to" (Session Five Researcher Reflection, February 14, 2013). The individuals, the group and myself as researcher would continue to gain strength and agency over time if we were to continue to spend more time together. This final comment suggests that saturation may not be possible in this study although I did feel like I was learning less of fundamental and critical importance as each session progressed. I interpreted this as evidence I was approaching theoretical saturation.

By Session Six participants noted that they were very assertive when articulating their areas of focus to the COSL chairperson, and noted increased levels of confidence and belonging. They described their relationships as that of friends and colleagues, a group of people who appreciated each other's strengths. This shift in the cohort from safety to comfort in vulnerability is an indication of the evolution of the group towards a more effective honest and trusting community.

Closing observations. I recognized in my Session Six reflections that cohort members did not need me to bring them together. They had formed their own bonds and were in contact with each other outside of the shared sessions. Some had shifted their ideas about leadership to be more aware of the importance of process and relationships rather than topics or products. I noted that people's confidence in themselves as change agents had ups and downs over the course of the research and they used the cohort group to reignite their passion as change agents. During the Session Six Sharing Circle, cohort members talked about the importance of the affirmation they received from the group, the positive safe space that had been created, the opportunity the cohort had provided to face insecurities and faults without judgement and the significance of the community. However, "One of the problems in having a really strong group like this is you realize you don't have that elsewhere. That is part of the isolation you feel in the first place." (Participant L, Validation Session). According to participants, involvement in the TLSJ cohort made one individual "a better person", and many members felt they had "more leadership capacity" (Session Six RA, March 7, 2013).

Impact of participating in a co-constructed community. Participating in a co-constructed community was a significant aspect of the experience for cohort members.

Participants said they benefitted from belonging to the community and felt it helped to normalize their experience and helped them cope with the negativity they experienced elsewhere. Time spent learning with other cohort members challenged them to be more effective and strategic in their work. Participating in the group allowed them to build their own leadership capacity and they found it to be a personally meaningful experience “The importance of community, the impact of this cohort inspire, sustain me” (Participant K Reflection, Session Six, March 7, 2013).

The two different aspects of the cohort sessions which were found to be meaningful for the cohort community were the processes and people described in this chapter. Processes valued by the cohort included dialogue, partner work, peer feedback, use of frameworks, personal and critical reflection, and practical strategies learned through structured group activities. Activity breaks helped energize the group, and prepared them for challenging and difficult tasks to follow. They seemed to provide a good counter-balance to the intense conversations about social justice. The opportunity to develop strong relationships with other cohort members was considered a real asset of the study. Through intense interactions and honest dialogue, they felt they were able to learn from people’s diverse experiences and their different contexts. Through these conversations, cohort members received input, support and feedback, including permission to let go of an initiative when necessary.

From the feedback from participants, my own observations and the findings from the various data sets, it appears the cohort community co-constructed through the study meets the criteria for various descriptions of effective learning communities identified in Chapter Two. These include Lipton and Wellman’s (2003) description of the

characteristics of effective groups; Burbules’ (1993) description of effective dialogue groups based on participation, commitment and reciprocity; Shields and Edwards (2005) description of communities that engage in dialogue for understanding; Lave and Wenger’s (1991) description of COPs that provide strong interpersonal support and cognitive stimulation; Saavedra’s (1996) description of teacher study groups that are dialogic, democratic and develop ownership and agency; and Heron’s (1996) characterization of co-operative inquiry groups as models of parity, dialogue and reciprocity. Table 45 shows which specific processes used to co-create the cohort community correlate with each paradigm.

Table 45

Cohort Processes Correlated with Paradigms for Effective Learning Groups

Paradigms →	Burbules	Lave & Wenger	Shields & Edwards	Saavedra	Heron	Lipton & Wellman
Processes ↓	Commitment Participation Reciprocity	Inter-personal support Cognitive stimulation	Carnival Shifts over time	Dialogic Democratic Ownership Dissonance	Parity Dialogue Reciprocity	Support Challenge Vision
Facilitation	X			X		X
Learning		X		X		X
Feedback	X			X	X	X
Dynamics		X	X	X	X	X
Reflection			X	X	X	X
Circles	X			X	X	X
Activity	X		X	X	X	
Community	X	X	X	X	X	X

Conceptual Model for Research Question Three

What I have learned from co-creating the cohort and co-constructing the critical community is summarized in Figure 41. The four attributes critical for co-constructing a critical cohort community are: the individuals, the group, and their interaction over time

through carefully selected processes. The impact of each of the attributes on participants can be found in the words immediately beneath each heading. The circular arrows at the centre of the diagram indicate that all four attributes are essential and inter-related.

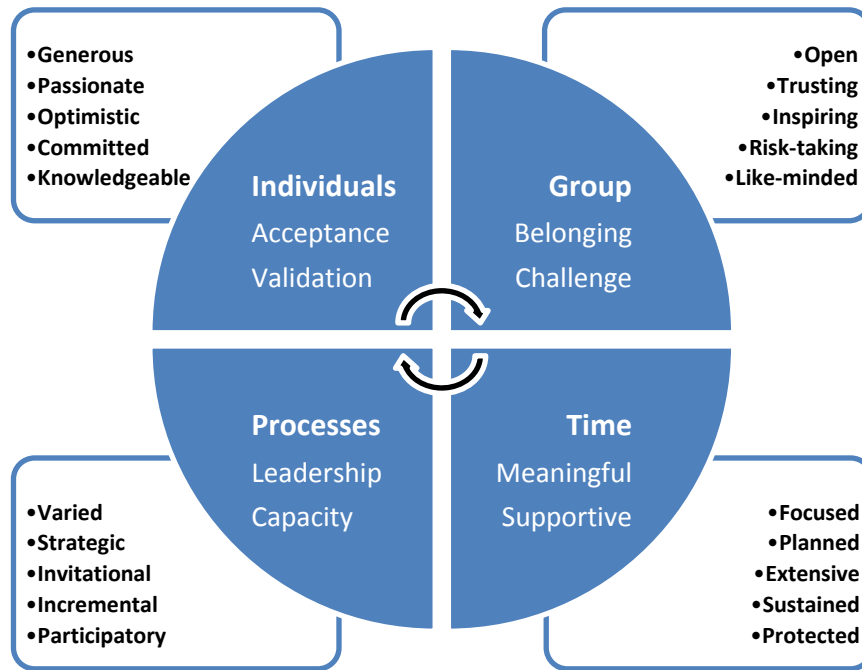


Figure 41. Attributes of a co-constructed community and impact on research participants.

The individuals who belonged to the TLSJ cohort identified in each other the characteristics of being generous, passionate, optimistic, committed and knowledgeable. Participants described feeling a sense of acceptance and validation from meeting others who shared their convictions. When participants described the cohort group they most often used the words open, trusting, inspiring, risk-taking and like-minded. Being a member of the group helped participants feel a sense of belonging and their comfort in the group supported them in issuing and accepting cognitive challenge. Developing a critical community requires focused, planned, extensive, sustained and protected time together as a community. This time together made the learning experience more

meaningful and supportive. Finally, the processes described in this chapter that facilitated the growth of a strong cohort community were effective because they were varied (especially in groupings), strategic, invitational, incremental and participatory.

Participants reported that the processes used strengthened their leadership capacity.

One important interpretation of Figure 41 concerns its transferability to other leadership development initiatives. I believe this study has shown that the four attributes identified in the figure are essential features to consider when co-constructing a learning community. The individual descriptors outside of the top two sections however refer to the particular individuals and cohort group involved in this study. Naturally these specific descriptors will differ with each cohort. Despite this variation, it is essential that facilitators be observant and responsive in their planning to the characteristics of both the individual participants and the group as a whole. The bottom two sections of the figure, time and processes, along with their more specific descriptors, are relevant guiding principles which can be applied in different circumstances regardless of cohort characteristics. The four critical attributes of a co-constructed learning community included in Figure 41 closely resemble the people, process, context and time (PPCT) model of human development articulated by Bronfenbrenner (1995). Although Figure 41 does not include context, the leadership development sessions are the context in which the four attributes of a co-constructed learning community were identified and I articulate the significance of this developmental context elsewhere in this dissertation (see Chapter Eight).

The type of nurturing learning community co-created in this study was intended to be a “nurturing context in and out of which a person grows” (Drago-Severson, 2009, pp.

56-57). Drago-Severson describes the qualities of what she refers to as holding environments:

A good holding environment both supports a person where he or she is in terms of making meaning of life experiences and challenges the person to grow beyond that, but without conveying any urgent need for change. ... In these contexts, all leaders meet learners where they are, provide challenges for growth and learning, and stay around while the learner is demonstrating a new way of thinking and acting. (Drago-Severson, 2009, pp. 12-13)

The cohort community co-constructed through this study satisfies Drago-Severson's description of a holding environment in which adult learners are both supported and challenged.

Summary of Chapter Nine

In this chapter I have focused on how people and processes contributed to the co-construction of a critical learning community. Chapters Seven to Nine answered the first three of my four research questions. These findings constitute the essential components of the leadership development model to be more fully explored in Chapter Ten. Chapter Seven synthesized the knowledge, skills and dispositions of teacher leaders for social justice. The theme of Change Agency captured this research question's main components. Chapter Eight presented the seven essential elements to be incorporated into leadership development sessions with a focus on critical reflection. The theme of Adult Learning captured the processes recommended for leadership development. Finally, Chapter Nine identified the eight processes to be incorporated into the leadership development sessions to facilitate co-constructing a critical learning community. The

theme of Cohort as Community reflected the core attributes of this area of focus. In the next chapter I answer the fourth research question: “What leadership model incorporates these findings and enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools?”

Chapter Ten: Leadership Development Model

Chapter Ten Overview

The fourth and final research question concerns the development and refinement of the leadership development model. The research process developed to monitor and revise the implementation process for the model was outlined in detail in Chapter Six. Much of the presentation of findings in this chapter originated in one of the ten data sources outlined in Chapter Six (Process Folio of Researcher's Action Research Inquiry). A second key data set used for responding to this research question was my "Research Question Notes" which I compiled after each session was completed but did not review and analyze until the study was complete. These notes were organized by research question, session and learning experience and included content deemed significant from each session summary.

In this chapter, detailed findings are presented in response to research question four that have emerged from a cross examination of the multiple data sources shown in Table 46. I identify findings generated through the action research cycle process that inform revisions to the leadership development model. The chapter is divided into three sections. The first section concerns content that was valued by participants in the cohort and its impact on participants, schools and the model. The second section of the chapter presents the fourth theme of Leadership Model Development, refined through consultation and collaboration with cohort members. The third section presents and explains the conceptual model (Figure 6, p. 91) after it was revised to reflect the results of the study.

Table 46

Data Forms and Sources by Session for Research Question Four

Data Forms	Data Sources by Session (S)						
	S1-S6	S1	S2	S3	S4	S5	S6
Observations	Video and Audiotaped sessions Researcher Reflections Field Notes						
Interviews	Participant Reflections Learning Focused Conversations (video S1, audio S1-S6)		Conversations with Critical Friends	Conversations with Critical Friends			Self-Assessment Reflections (SARs)
Artifacts	Researcher: <ul style="list-style-type: none"> • Facilitation Guide • Researcher Checklists • LFC Questions • Researcher Journal 					Theme Presentation	
	Prepared Session Materials: <ul style="list-style-type: none"> • Agendas • Logic Models • Action Research Cycles • Themes 	Design Frame Conceptual Model Carousel Chart Questions	Lambert Article	Strengths and Stretches	3 Articles Fierce Conversation handouts	Role play Scenarios Johari's Window SJ Lens Template	Carousel Chart Questions
	Materials collected during sessions	Carousel Chart Responses		Image Theatre Handout Group Profile	Article Presentation Charts		Carousel Chart Responses
	Participants: <ul style="list-style-type: none"> • Participant journals • Participant Action Research Cycles • Emails 	SJTLSA's	Theme Feedback	Theme Feedback Peer Reflections (SJTLPRs) Strengths and Stretches	Theme Feedback Peer Reflections	SJTLPRs Valentines Johari's Window completed SJ Lens completed	SJTLASAs

Note: Data sources informing findings for research question four are in bold blue font.

Valued Features of Leadership Development Sessions

Features of the leadership development sessions valued by cohort members fall into five categories: topics, processes, program attributes, facilitation and design. Topics that resonated with participants included many I had anticipated would be important such as leadership capacity, leadership frameworks, inclusion, action research and social justice. Topics that were more significant than I had anticipated were the principles and processes of effective groups, fierce conversation theory and skill development, and data analysis in action research. I was also reminded of how important it is to carefully select meaningful and accessible readings that can help convey content.

Processes that were used during sessions made very significant contributions to members' learning. The core process throughout the sessions, as anticipated by Focus Group Three and experienced by participants, was critical reflection. Dialogue was very important, focus groups anticipated and participants recognized the need to debrief after completing the self-assessment or receiving peer feedback. Activity breaks and built in networking time also helped members debrief after particularly emotional content. Opportunities to receive feedback and be mentored through learning-focused conversations were appreciated by participants and cohort members also found facilitating the conversations to be a strong learning experience. Multiple grouping strategies facilitated interaction between all cohort members, especially use of partner and small group work. When working through difficult content, members appreciated the use of specific processing strategies and opportunities to practice new skills. Participating in action research was meaningful and helped teacher leaders with their own cycles, and

the sharing circles provided synthesis at the end of the day. Cohort members appreciated having input as sessions unfolded as well as into planning for future sessions.

Attributes of the program that were considered important were having a comfortable and neutral off-site location for sessions, providing substitute coverage, providing good food and breaks for conversation and networking. The amount of time spent together per session and the number of sessions needed to be as long as possible. After about thirty hours I noticed a shift in the comfort level and depth of people's interactions, yet the group requested an additional session and decided to continue working together in the following year which indicates a desire for further interaction. Other attributes of a critically oriented leadership development model valued by focus groups and cohort members were having participants confront their personal privilege, establishing a high level of trust and authenticity and providing support for processing difficult knowledge. Two important aspects of the program were using the experiences of individual members creating change as inspiration for the group and making explicit connections to social justice activities in the community.

The most important aspect of facilitation for the cohort was the responsiveness of the facilitator. The research participants appreciated adjustments being made to the agenda, having input into its content and design, and my willingness to change plans en route. I got better at this as the sessions progressed and became much less committed to my written agenda. The cohort commented on these days as feeling more relaxed and they noticed and appreciated when they had a facilitator who was less driven to complete tasks. I found it was important that I be on the "same wave length" as participants throughout the day. This meant that when they wrote I wrote, and I participated in most

activities unless they were in partners and there was no extra person with whom I could partner. This helped me get a sense of the energy needs of the group and make adjustments accordingly.

Timing and pacing are elements of design for adult learning. I paid attention to the sequencing of activities in my agendas but often needed to rearrange items to respond to unanticipated events or activities taking longer than anticipated. I was very careful to protect people from tough activities by sandwiching them between less demanding ones and often included time for debriefing in a small group or in writing. I also learned to pay attention to the movement needs of group members and respond accordingly. I learned to pay heed to the principles of diamond design (Lipton & Wellman, 2011c). The core concept of diamond design is that activities begin with individual reflection, move from there to small group dialogue, large group sharing, then back to individual reflection for action; the diamond aspect refers to the size of the group involved. I found when I didn't close the diamond at the end of an experience I didn't know what people were taking away from the experience and often they had no closure either. Closing the diamond strengthened synthesis and increased the likelihood of application to personal contexts.

Impact of Participation in the Study

Participating teacher leaders commented frequently on the impact of their participation in the leadership development sessions and job-embedded action research. Their involvement in the leadership development sessions impacted the participants, their schools and the leadership development model.

Impact on participants. As a result of participating in the leadership development sessions, participants noted that they felt more comfortable in leadership

roles and better equipped to create change as a result of increasing their understanding of action research. According to their Session Six carousel feedback, conducting action research helped participants identify and clarify strength-based strategies and articulate their desired outcomes. Action research provided participants with a sense of direction and a focus on leadership, goals and strategies. It helped build their confidence, and kept them invested and accountable. Searching for evidence was fun and action research became a new tool they could use in their work. What helped them in the process was the opportunity to journal and participate in learning-focused conversations with other cohort members during sessions, and with the researcher in their schools between sessions.

Through participating in the leadership development sessions, members attested to more growth in their leadership skills, particularly their ability to address uncomfortable issues, develop a stronger shared focus and gain insight into their students. Cohort members noted that they felt empowered to make a difference. I commented on an emerging awareness of impact in my researcher reflections:

I really feel that my study is making a difference: in their understanding, their confidence, in their willingness to take on risks, in their skill development. They are talking back at their schools and making change in their practice. They are developing agency. (Session Four Researcher Reflection, January 10, 2013, p. 4)

Reflecting on the impact of the study on participants I observed: “It is transformative for these participants. There is growth and movement in their attitudes and how they perceive things” (p. 6). By Session Six I was noticing that the participants themselves were aware of their increase in agency: “I think teachers are feeling like they do have agency, they can make change” (Research Question Four notes, Session Six, p. 16). Changes in their

practice resulted not only from conducting action research but also from their participation in the cohort.

The most valuable aspects of the leadership development sessions identified by research participants were having conversations with like-minded people, the time and space for those conversations to occur and the time to write in their journals. Reflective practice helped them identify as teacher leaders and change agents. It also helped them see their strengths and weaknesses and gain a clearer perspective on what they were doing. The environment that was created allowed them to increase their agency through reflection, group problem solving and shared solidarity. Other areas of growth were in learning how to conduct learning-focused conversations and developing strong relationships with other cohort members. Two members began Masters programs during the cohort to extend their learning. Many cohort members found their participation in the cohort was transformative: “I knew I enjoyed my time here and that I was using some of what we have learned but I was unaware of how much it all influenced the way I see myself and others or the way I interact with others” (Participant S Reflection, Session Six, March 7, 2013).

Impact on schools. Determining the impact of cohort members’ participation in the leadership development sessions on schools required attending to multiple indicators. Members shared content from the sessions with their school colleagues. One member shared specific items from the SJTLSA with her administrators who were considering using them as questions for upcoming staff meetings. Another participant shared the material on characteristics of effective groups with her administration as a way to open up dialogue about how committees operated in the school. Individuals also commented

that they were planning to share some of the books we looked at with their administrators, such as one on conducting crucial conversations (Patterson et al., 2002).

The action research studies carried out by cohort members had more of a visible impact on their schools. Participants identified the impact of their action research on others in their school communities including students, teachers and families (Table 33, p. 291). One example of influence on students through participant action research is that student engagement and on task behaviour improved as a result of teachers' increased use of differentiation strategies introduced by a participating literacy coach (Session Two AR Cycles). A second example was that teachers' participation in social justice activities became more focused and consistent with the goals of a school-based change strategy as a result of the action research, which in turn made school-wide learning experiences more meaningful for students (Session Five AR Cycles). In a third example, home and school connections were strengthened when a participating teacher leader and parent of a child living with autism developed and co-presented experiential autism workshops to all school classes (Session Five AR Cycles). Additional impact from participants' action research included getting other colleagues engaged in social justice work, taking on new leadership initiatives, finding joy in being a servant leader and consciously acting to build and strengthen their community. Through engaging others, cohort members found there was an increased sense of purpose and voice, clarity about roles on committees and increased camaraderie on staff.

Finally in the area of school climate, participants observed increasing ability to satisfy the needs of multiple constituencies at once, a stronger sense of community and celebration and a desire to continue along a path of change. Further follow-up would be

necessary to determine additional longer term impact on schools as cohort participants continue to develop leadership skills and demonstrate agency in their school environments.

Impact on the model. Considering impact on the model, it seemed clear that the time the cohort spent together learning within the leadership development sessions was significant because the rate of learning was steady throughout the sessions. There was definitely catalytic validity as a result of the strong relationships between participants that have high potential to stimulate and sustain further change beyond the sessions themselves. Other support for the leadership development session model came from participants who overwhelmingly said that they wanted others to benefit from the cohort experience and asked to have their materials returned to them. When I reflected on this request, I realized its significance: “That is evidence they are finding it (the materials and activities) meaningful. They want it back. They want to use it again. They want to use it in their practice. That is really good evidence of impact” (Research Question Four Notes from Session Four, February 14, 2013, p. 16). As the leadership development sessions progressed, a further theme emerged from the thinking of cohort members that focused on the leadership model development.

Leadership Model Development

Valued features. Over the course of the study, through participant reflections and session activities, cohort members identified the features of the leadership development sessions that were most meaningful for them. Commonly identified topics are described below and included: personal growth, direction, engaging others, working with groups,

the change process, leadership capacity, sustainability, wellness, equity, crucial conversations, paraphrasing, transformative learning and conversations about leadership.

Personal growth. Cohort members joined the study seeking personal growth, lifelong learning and an opportunity to ask themselves and their communities to consider critical questions. They appreciated opportunities to grow as individuals and share critical perspectives with their school communities.

Direction. There was a collective desire amongst the cohort participants to determine the “right things to do” as change agents for social justice. From the outset, it was clear that as a group they were seeking direction about how to most effectively stimulate and engage in change processes at the micro (local), meso (systemic), and macro (global) levels. Cohort members were seeking visions of sustainable change processes and insight into how this research study and shared time together could further this agenda. The ability to envision the kinds of changes they wanted to occur was seen as a critical step in attaining those goals.

Engaging others. At the outset, cohort members were seeking ways to engage with their colleagues in talking about difficult topics to educate colleagues about social justice, overcome their resistance to change, decrease tension in the school and increase buy-in for new initiatives.

Working with groups. The content that focused on the practical aspects of leadership such as how to work effectively and purposefully with groups was particularly valued. The frameworks that were introduced helped to validate and build upon their personal intuition and experience.

Change process. Cohort members valued opportunities to learn about the change process through others' personal experiences, especially how to overcome roadblocks. Roadblocks included attitudes, resistance, multiple demands, low self-efficacy, isolation and ambiguity.

Leadership capacity. Leadership capacity is the willingness and ability of a wide variety of individuals to participate in shared leadership within a specific shared context. Learning to build leadership capacity in themselves and others was a reason many members decided to participate in the cohort.

Sustainability. Cohort members desired to work smarter not harder, in ways which were sustainable for their personal health, the health of their families and the sustainability of their work within organizations. One struggle for cohort members was worrying whether anyone would step up to fill the void if they stepped back from roles they traditionally filled.

Wellness. Wellness is not merely an absence of illness, it involves having sufficient physical and emotional energy to do those things in your life that are the most important. Cohort members struggled to pay attention to personal wellness while fulfilling their multiple personal and professional commitments.

Equity. Equity is described as providing safe environments for all learners and appropriate supports for marginalized students. Cohort members were interested in working to establish equitable environments in their schools.

Fierce conversations. During Session Four we had a presentation about crucial or fierce conversations which outlined and explained the big ideas behind these two approaches. Crucial conversations occur when the stakes are high, opinions differ and

emotions are strong. Cohort members found this content to be relevant and valuable.

What struck members as important was the importance of staying in relationship with the other person and staying engaged in the dialogue rather than resorting to silence or violence.

Paraphrasing. Participants learned about the importance of paraphrasing, active listening and reflective questioning and had opportunities to practice their skills in learning-focused conversations about action research with other cohort members. Participants found these skills difficult to apply, yet far more powerful and effective than they had anticipated. After taking a medical leave which would segue into retirement, one participant commented: “Even though I am no longer in the system, I plan to revisit these strategies to improve my ability to be a leader in other capacities in the community” (Participant M, Written Feedback, May 30, 2013).

Transformative learning. During Session Four, cohort members each read one of three research articles. The topics included: leadership strategies to build equity in schools, transformative learning and leading, and the role of dialogue in social justice leadership. Participants found the content challenging and appreciated the opportunity to process the readings with others in a small group constructivist learning environment. For one group in particular, the time spent in conversation with others was critical to understanding an article they found challenging individually. Their experience of moving from disequilibrium to resolution was an example of both transformative learning and synergy.

Conversations about leadership. Cohort members anticipated the opportunity to speak with the Chairperson of COSL and many prepared in advance what they wanted to

share. When asked to explain their area of interest, participants stated: “(I’m) interested in... adopting different types of leadership depending on the situation and the needs”; another, said “I am a literacy coach... This brings up issues of inclusion, access and leadership working with teachers.” A few participants shared negative experiences: “The leadership style in my school has made it difficult... when people are bullying it is swept under the carpet.” After discussing various levels of collaboration by administrators and teacher leaders, one participant offered her very positive experience of collaborative leadership with the leaders of her division around supporting LGBTQ students:

My superintendent team ...were so open to supporting us and supporting us in collaboration. When a leader is able to recognize that leadership or that initiative and support and work collaboratively with teachers it can lead to great positive change for kids ...That willingness to ... not have to take ownership ... and develop the leadership on staff can do great things. (Participant Introductions to COSL Chair, Session Six).

The ensuing conversation introduced and clarified some leadership concepts and beliefs and also provided useful leadership templates or frameworks from assessment for learning, counselling, mediation and equity leadership.

Revisions to the Conceptual Model

The conceptual model (Figure 6, p. 91) developed for the leadership development program initially informed and guided the leadership development sessions. As a result of my experience implementing the leadership development model I created a revised conceptual model which reflected new findings gleaned through the research process.

The new model has three phases like the original; however, there are differences to note.

Content from levels one and two of the original model have been combined into one phase. These first two layers, which provided me with a clear articulation regarding who to recruit and the intent of the program, remain for the most part unchanged although the teacher leader cohort recruitment section has been further developed. Phase two contains new content derived from the data collected and analyzed during the research process. Phase three replaces the anticipated outcomes from the original model with the actual outcomes of the study.

One persistent structural element in the model is represented by the strands which run through the center, right and left sides of the model. While these strands were not articulated in the original description they were prevalent in my thinking. In the current model they are distinguished by the colour of the hexagons in the model. The left pink strand includes elements related to teacher leadership skills. The centre yellow strand involves knowledge concepts related to leadership capacity. The blue strand on the right side contains concepts related to social justice and community. These will also be familiar as the three themes and corresponding colours from my literature review and autobiography. Each phase of the model has a lower and upper level with the name of the phase in the center of the figure. I explain each phase of the model providing a description both in text and where appropriate, through the use of graphic models. Once all phases have been described fully I will present the combined final model which has been revised based on the findings from this study.

Phase one: program design, recruitment and intent. The first phase of the model (Figure 42) includes the program design, criteria for recruiting participants and the intent of the leadership development program. Phase one is divided into lower and upper levels.

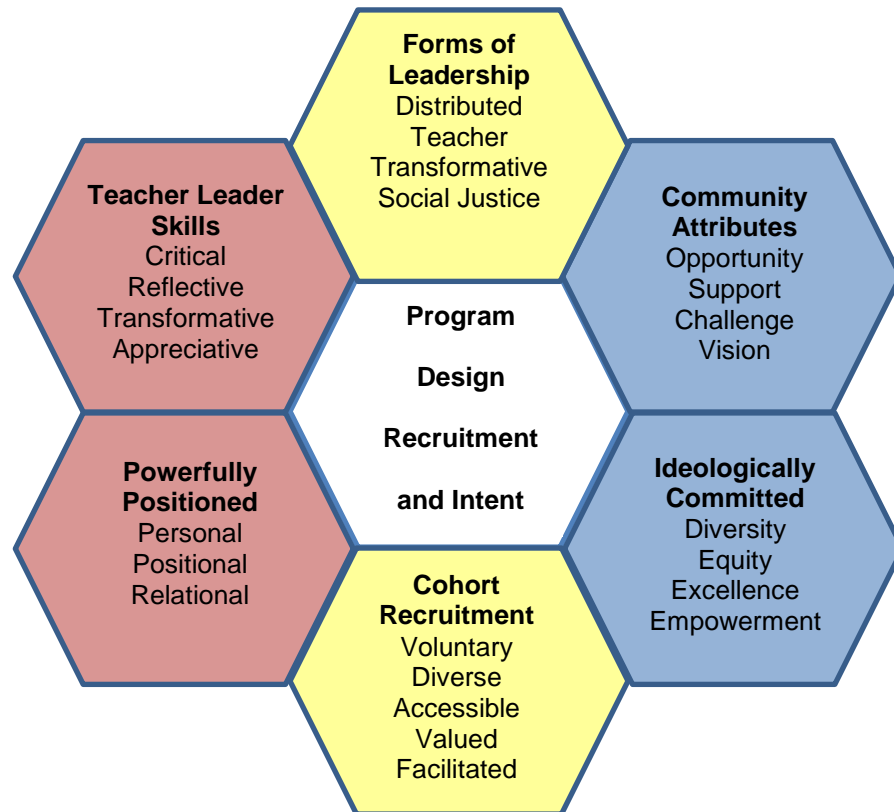


Figure 42. Phase one of leadership development model program design, recruitment and intent.

Phase one lower level. The core hexagons of phase one contain the same content as in the original model and follow the three strands described earlier. In the pink teacher leadership strand, the phrase Powerfully Positioned describes the characteristics of teacher leaders and why they are targeted as change agents in this leadership development model. In the yellow leadership development strand the lower half of phase one includes the recruitment criteria I am recommending, a diverse group of interested

teacher leaders who can be provided with protected, predictable and valued time in which to meet as a cohort with a qualified and experienced facilitator. The blue social justice community strand describes the ideological commitments of teacher leaders who would be appropriate participants for this form of leadership development: diversity, equity, excellence and empowerment. The upper level of phase one describes the intent of the leadership development model and program.

Phase one upper level. Starting on the left side in the teacher leadership strand, I have listed the teacher leadership skills being targeted in this model. Critical, reflective, transformative and appreciative inquiry skills are associated with social justice leadership. In the centre leadership development strand I identify the forms of leadership that participants should encounter through participation in the model: distributed, teacher, transformative and social justice leadership. On the social justice community strand of the upper level of phase one I describe the attributes of the type of community to be co-constructed to support growth and facilitate the recommended learning processes. Phase one lower and upper levels together present the program design, recruitment and intent of the leadership development model which are mostly unchanged from the original model. Phase two contains new content which emerged from the study.

Phase two: enactment, cohort features and content. Phase two (Figures 43 and 44) includes the features of the leadership development session model as implemented with participants in the Teacher Leadership for Social Justice Cohort, as well as the features which were most highly valued and considered critical by participants. The visual elements in phase two of the model are presented here to assist the reader in

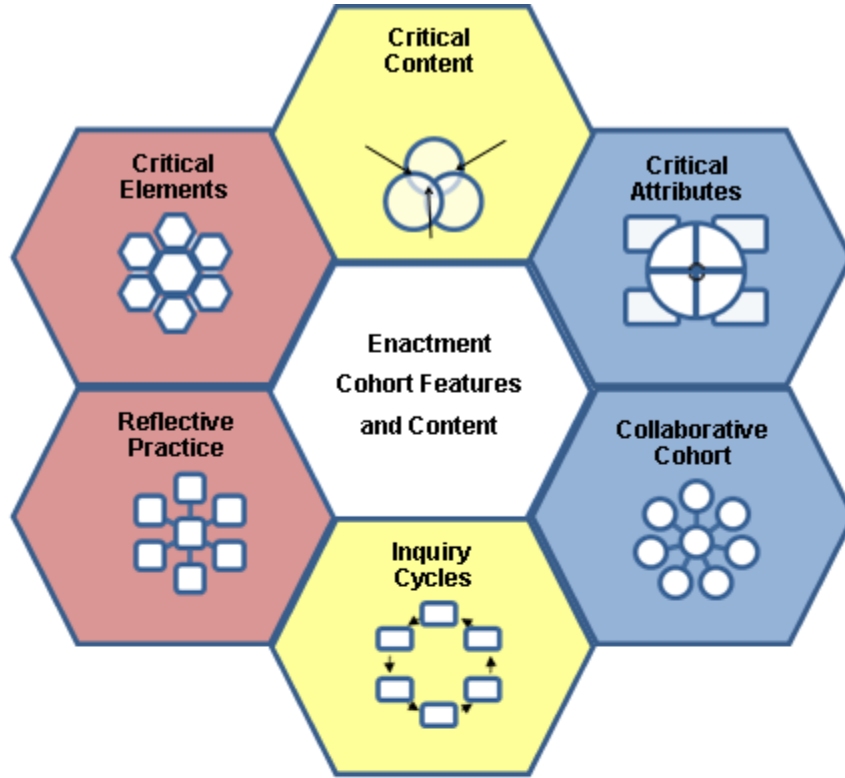


Figure 43. Phase two of leadership development model: enactment, cohort features and content (graphics).

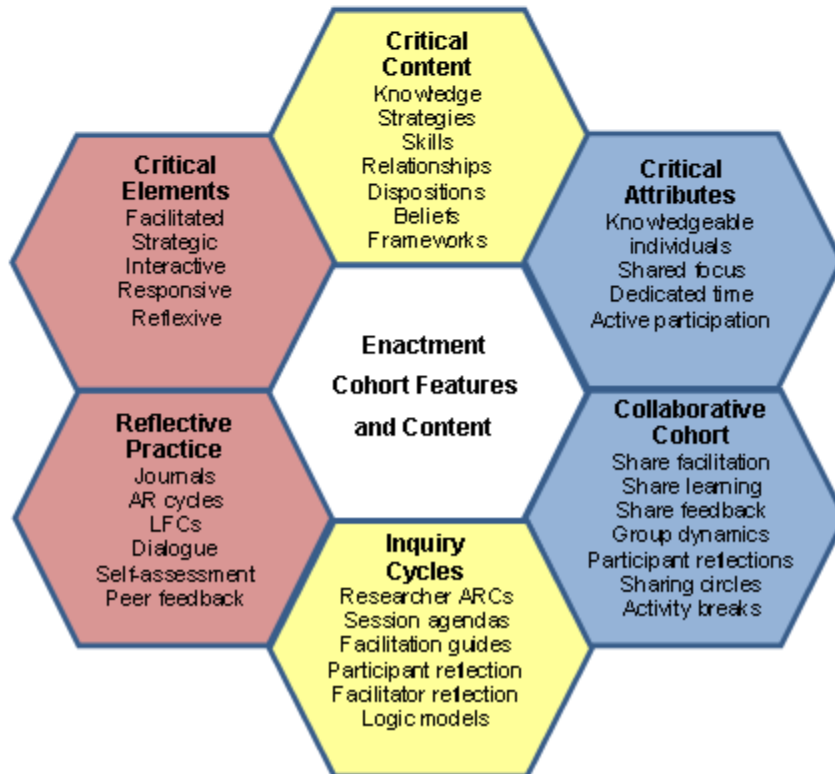


Figure 44. Phase two of leadership development model: enactment, cohort features and content (text).

associating Figure 43 with the visual models presented earlier. The design of the graphics included will be recognizable from earlier chapters in this dissertation. Figure 44 provides the text which supports the graphic images in Figure 43.

Phase two lower level. The lower level of phase two presents the features of the leadership development sessions implemented in this study. The pink teacher leadership skills strand for phase two lower level includes the specific elements of the leadership development model. The seven radiating rectangles visible in the Reflective Practice hexagon of Figure 43 represent the seven unchanged elements discussed and presented on the same shape of graphic in Chapter Eight. All the elements are associated with learning for participants, and are considered essential to the model, even if they were also used by me as data sources for the research. These include journaling, action research, learning-focused conversations, dialogue, self-assessment, peer feedback and critical reflection.

The center yellow leadership development strand presents the cycles of inquiry followed in each of the six cohort sessions. The circular shape of the graphic in the leadership hexagon in Figure 43 will be recognizable as the process followed in the process-folio for my AR inquiry presented in Chapter Six. Each session represented one ten step cycle of inquiry and there were six cycles overall. For each cycle the data collection and facilitation tools listed were created and utilized. Outcomes from this process guided each subsequent session.

To apply this process to leadership development programs outside of the action research study, I have selected in Figure 45 the appropriate items from the more extensive steps followed in this study. The recommended steps in my research process for future leadership development cohorts include the use of researcher action research cycles, session agendas, facilitation guides, participant reflections, facilitator reflections and logic models. In place of videotaping sessions and creating a transcript of each session I recommend observations be made about the group and impact of each process by the facilitator during the sessions. This procedure is a more realistic suggestion for future leadership development programs which will take place outside of a research context. I removed steps most closely associated with the research process, specifically the researcher's checklist, participants' response to activities, session summaries and cumulative themes. These steps are not recommended as part of the leadership development model unless the facilitator wishes to research their practice as I have done in this study. The lower layer of phase two of the leadership development model shown in Figure 45 therefore includes a graphic illustration of the process I recommend for facilitation of leadership development programs outside a research context.

The blue social justice community strand of phase two lower layer of Figure 43 presents the collaborative aspects of the leadership development sessions. The content of this section comes from Chapter Nine which focused on productive cohort processes. The radiating circular graphic shown should be recognizable as Figure 40 (p. 346) from Chapter Nine. This graphic represents the critical processes used with the TLSJ cohort that supported collaborative inquiry. This content remains unchanged from what was presented in that chapter and includes sharing facilitation, sharing learning, sharing

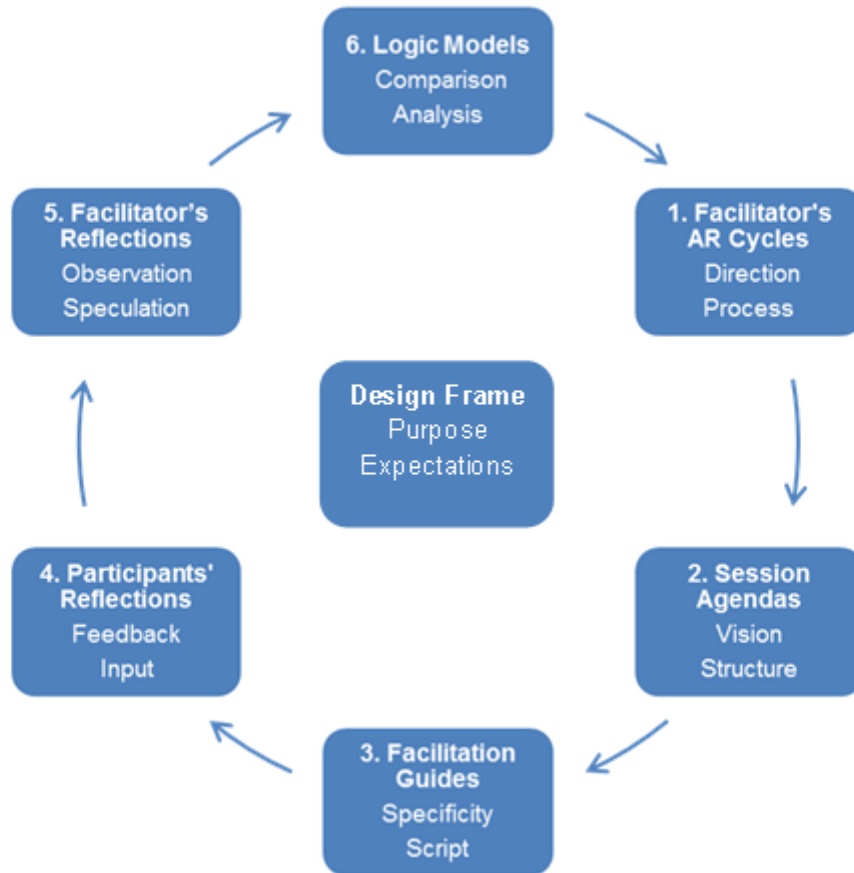


Figure 45. Recommended facilitation process for leadership development programs.

feedback, exploring group dynamics, participant reflections, sharing circles, activity breaks and co-constructing a community. Once again Figure 44 provides the text which supports the graphic in Figure 43.

Phase two upper level. The upper level of phase two (Figures 43 and 44) contains the content considered essential by participants in the cohort. This layer, like the others, is divided into three sections: critical contents, critical elements and critical attributes of the program.

The critical elements of the leadership development sessions which supported teacher leadership skill development are described on the upper level of phase two in pink. Participants repeatedly voiced the importance of sessions being facilitated,

strategic, interactive, responsive and reflexive. They appreciated that sessions were structured but also strategic in terms of specific facilitation strategies used for particular purposes; cohort members appreciated learning about the use of the processes as well as experiencing them as learners. Participants valued the thoughtful preparation for each specific learning experience and the way in which the agendas were constructed. The sustained focus over eight months and seven full day sessions provided many opportunities for dialogue with the same group of colleagues. The interactive and dialogic nature of sessions were very important to participants, especially the activity breaks, partner and small group activities. Participant feedback was considered carefully when preparing for the next session and transparency was honoured throughout as to the processes I was following and the conclusions I was reaching through analyzing the data. As a consequence participants felt the sessions were very responsive to the needs of the group. The reciprocal and reflexive nature of the sessions was also valued. There was reciprocity between being a leader and a follower: participants appreciated opportunities to share in the facilitation of sessions and welcomed opportunities to share their experiences with creating change. There was also reciprocity in that they were both mentees and mentors through the learning-focused conversations and small group dialogue; and reciprocity occurred between me and participants as themes were presented for feedback.

The centre yellow leadership development strand of phase two's upper level identifies the content considered to be of critical importance to cohort participants. It focuses on the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools. This layer synthesizes the findings explored in Chapter

seven and answers the first research question: “What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?”

The five skill areas considered essential for teacher leaders to be critical change agents in schools are: facilitation, critical reflection, capacity building, collegiality and relationships. The five types of knowledge considered critical concern social justice, leadership, learning, collaboration and change. The dispositions considered essential are being open, empathic, committed, action oriented and optimistic.

Also included in this phase are the secondary characteristics of teacher leaders as change agents. Teacher leaders need to be familiar with strategies which blend knowledge and skills, form and maintain strong relationships through a combination of both dispositions and skill, and finally possess strong beliefs formed through a combination of knowledge and disposition. The central unifying ability of teacher leaders, as shown in the model, is to select, apply and utilize frameworks (e.g., Social Justice Lens, BCTF) which support their leadership work in schools. These frameworks reflect their knowledge, incorporate their skills and support acting upon dispositions associated with social justice leadership. These findings synthesize the theoretical and practical contents of the SJTLSA and SJTLPR as well as the strategies adopted by participating teacher leaders. As a consequence, this phase reflects the content most valued in the leadership development program as well as participants’ contributions based on their lived experience as teacher leaders.

The social justice community strand of phase two upper layer describes the critical attributes of a co-constructed community. The graphic in Figure 43 corresponds to Figure 41 (p. 368) at the end of Chapter Nine in which I explored the attributes and

impact of participating in co-constructed community. The four features considered essential for creating community were a group of knowledgeable individuals, a shared focus, dedicated time to spend together and active participation facilitated through adult learning processes. Individuals in this cohort were optimistic, committed, passionate, knowledgeable and generous. They experienced acceptance and validation as they got to know each other. The cohort was a group of open, trusting, inspiring, risk-taking and like-minded individuals. Membership in the group provided a feeling of belonging and facilitated participants' issuing and accepting challenge. The time that we spent together was effective because it was planned, focused, protected, extensive and sustained. The extensive time period made the experience more meaningful and provided sustenance to participants. The processes used to facilitate adult learning were valued and effective because they were varied, strategic, participatory, incremental and invitational. This contributed to participants developing leadership capacity. As mentioned earlier the individual and group characteristics may vary in another cohort however it is important that the facilitator respond to the characteristics of the individual members and the group as a whole when planning for effective learning experiences.

This particular cohort community demonstrated essential qualities such as being inclusive: each member belonged and was considered an equally valued part of the group. Individual differences were valued and appreciated as strengths. The group was collegial in that they supported each other's growth and were not afraid to confront issues head on which was appreciated:

It's kind of like you have an appointment for a massage. You look forward to that date. I feel the same way about you guys. You can make it hurt that's okay, just

work it out... The trust level... Lots of times I see emotions right under the surface... That is so special. ... I need to stop more and just reflect. I've been saying that for years. It bothers me to think how many more years would it have been before I would have had that opportunity. (Participant R, Session Three)

There was also a real sense that the cohort valued the relationships between people and the group was very relational in its orientation. This relationality was felt through the different groupings for activities, the time to connect informally during breaks and the genuine interest in and support for each other. The pace and challenges presented to participants were experienced as sustainable. Sustainability referred to the manageability of the workload and the energy of the group which sustained individuals even when they were apart. Interestingly, they gained energy from each other and were able to carry it home with them. Cohort members described the space created with the group as one of safety. They felt it was a space in which they could be vulnerable and take risks without fear of retaliation or censure. They found the group to be very supportive and the experience of being with a group of like-minded peers was validating. They were supported by discovering others who shared their passion and optimism. Most importantly perhaps, the group found each other to be inspirational. They left sessions inspired to do more, work smarter and with renewed belief in their ability to be change agents. I have described how phase two focuses on the enactment of the cohort and identifies its critical features and content. Phase three contains the outcomes and impact for participants in the cohort.

Phase three: impact, outcomes and agency. Phase three (Figure 46) has only one layer which includes the outcomes and impact of participating in the cohort: transformative experiences, frameworks for action and sustainable engagement. The pink teacher leadership strand of phase three describes the transformative learning which occurred through participation in the leadership development sessions. Many of these outcomes were revealed by higher scores in the Personal Experiences section of the SJTLSA. Participants' skills increased in conducting and understanding action research.

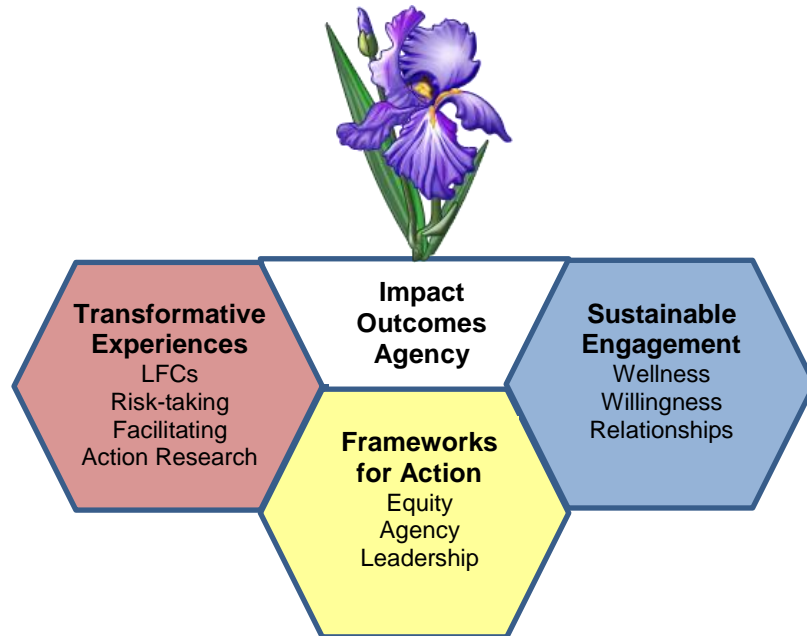


Figure 46. Phase three of leadership development model: impact, outcomes and agency.

Purple iris flower. [Clip art]. Retrieved from <http://office.microsoft.com>.

They also learned how to conduct and learn from learning-focused conversations. As a result of their participation, cohort members were more prepared to take risks and better equipped as change agents. Most felt they had acquired skills in facilitation, including effective strategies and processes. As a result of their new skills they had acquired the

ability to participate in fierce conversations with their colleagues and felt empowered as teacher leaders. These experiences were described by participants as transformative.

The center yellow leadership development strand of phase three describes the frameworks for action that participants developed through the leadership development sessions. Specific knowledge included frameworks for action around equity, leadership and agency. Cohort members indicated significant growth in knowledge as a result of participating in the leadership development sessions. This growth in knowledge was confirmed by the increased Knowledge scores on the second completion of the SJTLSA. They specifically indicated they had learned more about attitudes which support shared leadership and were more comfortable in the role of teacher leader and change agent. They felt they were more knowledgeable about ways to engage in their school community as a result of participation in the study and had increased their leadership capacity.

The blue social justice community cell of phase three describes the outcome of sustainable engagement. The dispositions and personal attributes described in the SJTLSA and SJTLPR were valued and understood by participants as contributing to their effectiveness as social justice leaders. The relationships they formed with each other have potential to support them in further growth as they plan to stay in touch and continue to network and support each other. Some indicators that the experience was valuable for participants can be discerned. They asked to get all their materials back once the research was completed; they wanted other teachers to have a similar experience; and they specifically advocated for their colleagues to have access to reflective learning-focused conversations through a similar program: “This is a model to take elsewhere” (Participant

T, Validation Session). Participants felt they had increased their personal wellness through participation in the cohort, their engagement in social justice issues and their willingness to take initiative. Participants felt prepared to be change agents, ready for action and joyful about their involvement.

The top and final element in phase three of the leadership development model is an image of an iris. This iris represents the agency of social justice teacher leaders. The reason for the choice of an iris and its associated symbolism will be outlined in Chapter Eleven.

Revised Leadership Development Model

Figure 47 shows all three phases of the leadership development model combined into one graphic. The base of the model is the program design and intent which occupy the first phase, the enactment cohort features and content occupy the second phase, and the impact and outcomes constitute the third phase of the model.

The outer frame of the model still represents the context in which leadership development takes place. Without an educational environment that values distributed leadership, there is little hope of teacher leadership being very effective. Transformative, social justice and instructional leadership were removed from the model because they were not found to be essential for teacher leaders to be effective. What was clear from discussion with study participants was that leadership development and teacher leadership take place within a context of change. To ignore the fact that the contexts of schools are ever changing would be naïve. The outside of the model has consequently been revised to include distributed leadership, teacher leadership and the context of change which describe the environments in which teacher leadership is enacted. Agency

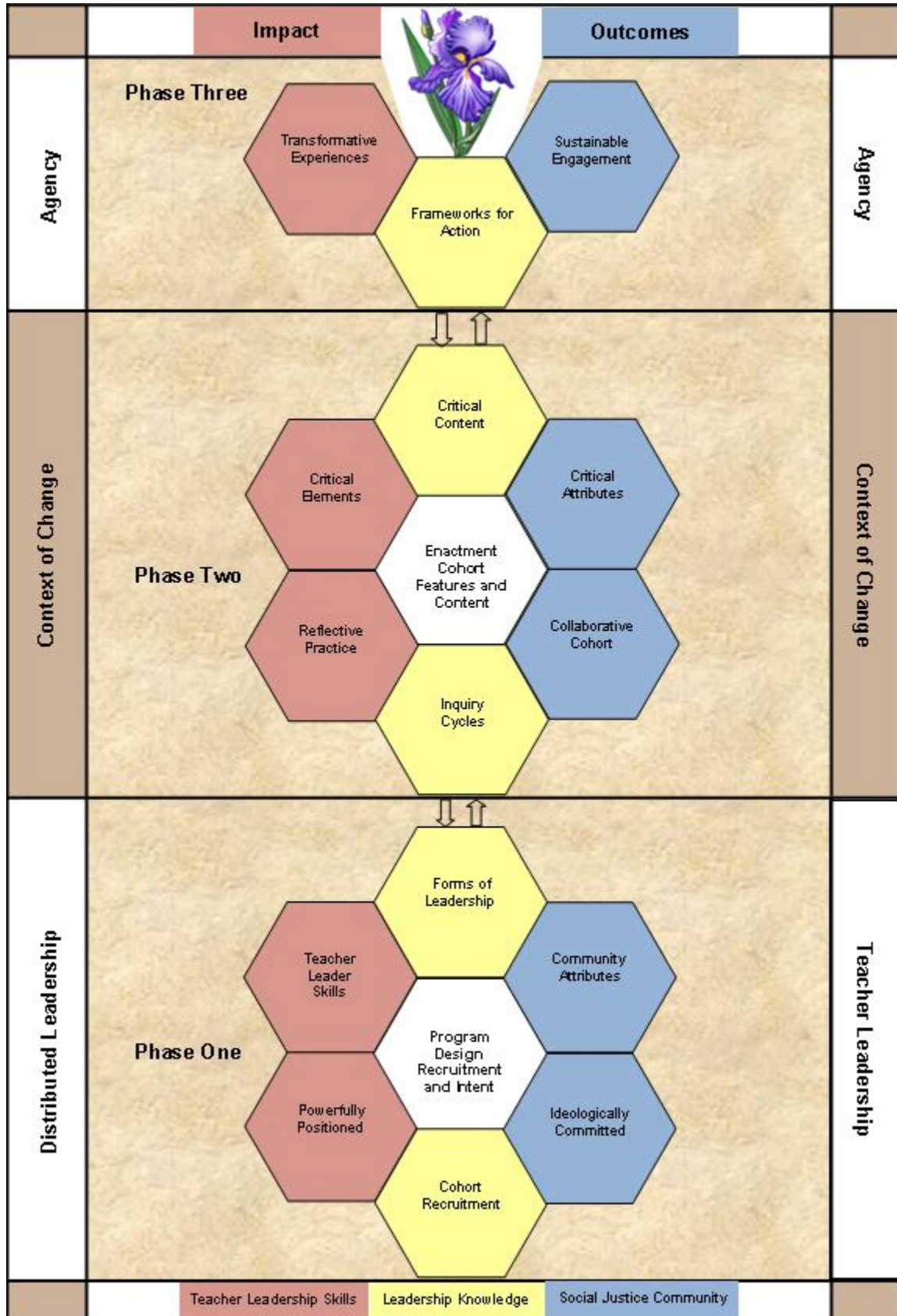


Figure 47. Leadership development model showing all three phases.

is prominent at the top of the model because increasing the agency of teacher leaders for social justice is the intent of the leadership development model.

Summary of Chapter Ten

In this chapter I described the processes used to answer research question number four. I identified the features of the leadership development sessions which were most valued by study participants. I described the impact of learning within the cohort on participants. I provided a discussion of aspects of the leadership development sessions that were most meaningful to participants in the Leadership Model Development theme which was refined in collaboration with participants. The latter part of the chapter describes revisions made to the conceptual model initially presented in Chapter Two. I introduced each of three phases of the model and described them fully. Finally, I presented a vision of the completed leadership development model. In the next chapter I will situate this leadership development model in a theoretical framework using the metaphor of an iris. This model seeks to explain the processes by which teacher leaders for social justice are strengthened and how their agency influences change.

Chapter Eleven: Interpretation

Chapter Eleven Overview

In Chapter Ten I elaborated on the leadership development model which has resulted as a consequence of this study. In this chapter I associate this model with the metaphor of an iris. This metaphor will be used to symbolize how such a leadership development model creates change. I begin by explaining the evolution of the iris as a significant metaphor for the study.

The Iris Metaphor

Throughout this dissertation I reference the iris as a metaphor for teacher leaders for social justice. I placed irises on our agendas, we had a reproduction of Van Gogh's irises posted during sessions and participants responded to a synectics learning experience about irises by collectively creating a piece of descriptive writing on irises. This collaborative poem created by the cohort was printed for participants to use as a back page binder insert at the end of our leadership development sessions:

Irises are beautiful

Bold and colourful

Harbingers of spring

The season of change

New life and new ideas

Their fragile and brief existence

Implies vulnerability

Yet their roots go deep

To find sustenance

To emerge

When conditions are right

Irises find strength with others

Contribute and are valuable

To their community

Throughout their life cycle

Like social justice leaders

Irises are naturally occurring

Tenacious and organic survivors

In all kinds of conditions

(Composite of TLSJ Cohort Responses, January 10, 2013)

This piece of writing actually captures the essence of the findings from this study and correlates with my four research questions, an unintended and serendipitous discovery. I first explore the significance of each stanza of the poem and how it connects with the findings of the study. Then I expand on the iris metaphor and integrate it with my leadership development model to further interpret and explore the implications of the study.

“Irises are beautiful, bold and colourful harbingers of spring, the season of change, new life and new ideas.” This stanza describes the knowledge, skills and dispositions of teacher leaders for social justice captured and described in responding to

research question one. The contents of the Venn Diagram shared at the end of Chapter Eight and again in Chapter Ten, articulate the knowledge, skills and dispositions of teacher leaders for social justice. This graphic synthesizes the content of the SJTLSA and SJTLPR, refined through three focus groups and two pilot studies, with what I have learned from the teacher leaders participating in the six leadership development sessions. Contents of this graphic and both tools are intended to be visionary and inspirational, like expressed in the poem “the harbingers of spring, the season of change, new life and new ideas”. The challenge to be a social justice leader is captured in the second stanza.

“Their fragile and brief existence implies vulnerability, yet their roots go deep to find sustenance to emerge when conditions are right.” The vulnerability of the iris mirrors that of teacher leaders in the study who at the outset talked about their sense of insecurity in their roles as change agents: “When someone doesn’t get the right nourishment or a weak support (stem) it falls down and throws off the balance” (Participant L, Journal Session Four). This stanza also connects with the elements of the leadership development model explored in research question two. It is the depth of experiences and content experienced in the cohort which prepares social justice teacher leaders to be sustainable over the long term. This stanza captures the fear with which study participants began the journey as a cohort, not feeling they could sustain their current efforts or sure of the right things to do. That vulnerability was reduced through participation in the leadership development sessions and having opportunities to share those feelings with other like-minded individuals.

“Irises find strength with others, contribute and are valuable to their community throughout their life cycle.” This stanza refers to the strength and growth

experienced as a result of participating in the co-constructed cohort with like-minded peers. It captures the fluidity over the life cycle of a teacher leader and their membership in multiple communities. The concept of community membership refers to the third research question which focused on the impact of participating in a co-constructed community. It also refers to the value of these individuals to their communities. Teacher leaders participating in the study use their new skills and knowledge in their various communities for multiple purposes.

“Like social justice leaders, irises are naturally occurring, tenacious and organic survivors in all kinds of conditions.” The fourth research question considers the type of leadership development model which will develop the agency of teacher leaders for social justice. The organic nature of the teacher leaders in this stanza refers to the fact that leadership emerges and develops, it is not taught but can be strengthened. Tenacious describes the deep roots and depth of experience and community each teacher leader acquired through their participation in the study. They joined because of their deep commitments but gained a stronger sense of efficacy and commitment through meeting like-minded peers and engaging in meaningful and challenging interaction. Organic refers to the way in which leadership develops differently depending on the different conditions in which it grows. Teacher leadership manifested itself through the action research undertaken by cohort members. These personal inquiries were influenced deeply by the conditions in which they were conducted. Just like the iris is impacted by the soil in which it grows, teacher leaders act differently depending upon their particular circumstances. When conditions threaten their existence or ability to flower, they may retreat but will resurface with another strategy or approach.

Situating the Leadership Development Model

The leadership development model presented in Chapter Ten synthesizes the research findings into a three part model showing the design of the program, its enactment, and finally outcomes and impact. While the model captures what actually happened and was learned from the study, it does not indicate its potential application to other settings or how it integrates into larger systems of change.

Figure 48 is a drawing of an iris plant. It is important to note in the drawing that the horizontal shape below the ground is called a rhizome, making irises rhizomatic plants (Hole, 1995). Rhizomatic plants, including irises have roots which network below the soil and send out tendrils perpendicular to gravity, often over great distances. Rhizomes can live for years without producing flowering plants and then surface and flower when conditions are right (www2.fiskars.com). Interestingly if rhizomes are cut they produce new growth from each new piece of the rhizome. This makes rhizomatic plants extremely durable and difficult to eradicate from an ecosystem once introduced. It is these features of the iris that influenced me to choose the iris as the symbol for the cohort.



Figure 48. Drawing of a heritage iris plant by artist Pamela Reichert in 2013. Used with artist's permission.

When I compare this image of the iris in Figure 48 with the leadership development model in Figure 47, some interesting observations are visible. The structure of the leadership development model has parallels with the diagram of the iris. Each part of Figure 49 has significance including the roots, the rhizome, and the flower.

The roots: fertile ground. The roots of the model are representative of the step in the planning process in which facilitators need to articulate the purpose of the program, the most appropriate participants and the qualities they wish to see in participants. These will vary according to the purpose of the leadership development program, and there will always be a need to engage in decision making and select the most appropriate descriptors for the particular program.

The descriptors I chose are specific to my intent to develop teacher leaders for social justice. If my goal was to develop teacher leaders for facilitating understanding and promoting dialogue around Aboriginal education, I would change the descriptors under ideologically committed to include those most relevant for the approach to Aboriginal education I was hoping to encourage. I would want to involve participants who believe in the importance of culture, language, Aboriginal world views and community. To recruit a diverse cohort I would seek out both Aboriginal and non-Aboriginal participants and seek to include individuals who reflect a broad range of cultural knowledge and experiences, understandings of the impact of residential schools and the importance of decolonization. I select these perspectives as significant based on research reviewed earlier by respected Aboriginal scholars (Battiste, 2005; Fitznor, 2005; Peden, 2011). A leadership development cohort designed to develop the agency of teacher leaders for Aboriginal

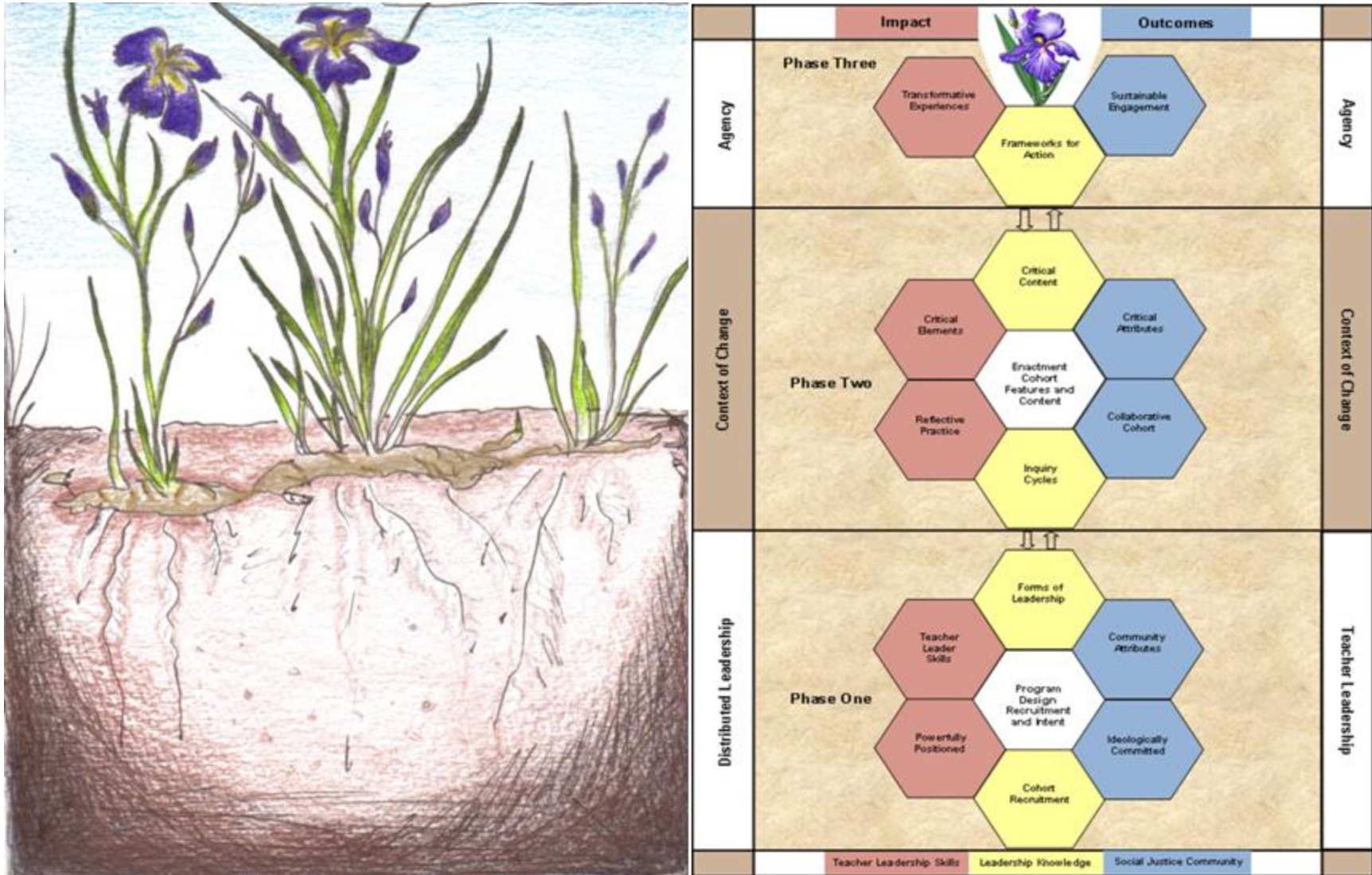


Figure 49. Iris model of leadership development (Figure 47) aligned with iris drawing (Figure 48).

education would also require either a facilitator or co-facilitator known by the community in which the program was offered and involvement of an Aboriginal elder.

If I wanted to use the model for developing leaders outside of a teacher leader context I would alter the Powerfully Positioned section to describe my choice of participants and the reason why I feel they are appropriate targets for this form of leadership development. I might for example look at development of student leaders, department heads or vice-principals and articulate the reasons for my choice of that particular group as agents of change.

My intent in providing these examples is to show how the model can be used flexibly for different circumstances. By changing the intent or focus of the model I believe the model itself can serve as a framework from which leadership decisions can be made. However, I cannot anticipate all the ways in which this leadership development model might be applied creatively to meet different outcomes.

The rhizomes. The methodology represented in the rhizomatic level represents the particular innovations I applied in the study and the contributions of each to participants' growth. I anticipate they might also prove to be beneficial for others as well. The rhizome in the leadership development model is the enactment phase at the centre part of the model, where all of the innovations for the leadership development sessions are found. It is here where skills, understandings and knowledge are developed and deepened. There were benefits from these activities that sent out tendrils during the study, to colleagues, students, school leadership and teacher associations. Some of these may not flower for a long time. Think for example about a fierce conversation facilitated with a colleague about the impact of homophobic practices or content on students. The

individual may not change their behaviour immediately, but the soil has been tilled and a seed planted for further growth. Each subsequent experience works upon that soil until there is ultimately new growth, insight and changes in practice.

Teacher leaders in the study were very aware that the impact of their efforts would be most significant in the long run. They were not merely pursuing short term change, they were interested in fundamentally influencing practices, beliefs, pedagogy and behaviour. On the surface some of the outcomes may seem so minute or even viewed as insignificant; however this perspective would be inaccurate. Underneath each flower on a rhizomatic plant is an underground network of roots which extend in all directions. If an initiative or change movement is interrupted or cut like a rhizome, each student, teacher, administrator or community member touched by the actions is capable, like a piece of the rhizome, of stimulating further growth when the conditions are right (McCracken, n.d.). Teacher leaders in the cohort often talked about timing as an important consideration of their actions. They were sophisticated observers of their contexts and strategic about how and when to introduce new ideas so as not to be cut off before they could flower. Participants also came to believe that their interactions with students and colleagues would contribute to further future growth.

It is this central part of the leadership development model described as the rhizome which is at the centre of the potential of this study. Interested individuals could adapt the rhizome (or innovation) to create one more appropriate for their context. Elements of the rhizome could and should be adapted or adjusted in response to the purpose, intent and structure of different leadership development models. It would be appropriate for facilitators to select from the menu of potential strategies those which

seem most suited to meeting the goals of their program and omit others. The benefits and impact of each strategy, articulated in Figures 39 and 41, would be helpful in making these determinations.

Rhizomatic growth. Offshoots, further growth and implications from this study could potentially be far-reaching. The roots in phase one (Program Design Intent and Recruitment) could help others frame and design other leadership development programs in a purposeful and structured way. The innovations consolidated in the rhizome can each have their own offshoots. For example, practitioners may choose to implement specific elements reflected in the elements of the sessions or incorporate strategies named here for documenting action research or building community.

1. *Effective learning methods.* Someone may choose to incorporate only the elements of the leadership development model into a professional learning program they are facilitating for a different purpose. In other words, these strategies represent good principles of adult learning that hold potential for facilitating learning and growth.

2. *Effective action research strategies.* The process-folio as a method for documenting each leadership development session might be adopted by someone else conducting an action research study. I found my record keeping and analytic methods very helpful and others may choose to apply them as well or model their own after my practice. I also found the methods used to be very helpful for study participants, so groups that work together might choose to keep track of their actions on a logic model for example, or articulate the purpose of their activities prominently using another format.

3. *Effective community building strategies.* The strategies used to co-create the cohort community are applicable to other adult learning contexts. Although the exact

strategies were particular to this context, they have been categorized and labeled in a more universal way. A strategy, for example, such as “sharing learning” could mean that professors share their research at faculty council meetings or that teachers share their learning after a professional development day. The strategies are certainly not unique to my study. I do not claim to have invented the strategies. What I am aware of is that the way in which I integrated these strategies into my work with the cohort was very effective and my experience may benefit others.

4. *Applicable leadership development model.* The leadership development model developed through this study has as its specific intent to develop teacher leaders for social justice. Its potential however, extends beyond this narrow focus. Through substitutions in key locations in the tool such as recruitment criteria in phase one and critical content in phase two, the leadership development tool can be repurposed to provide guidance for leadership development programs with a different stated intent (e.g. teacher leadership for sustainability or Aboriginal education). The leadership development model in its current format has potential value for many different educational organizations. Unions or professional associations such as the Manitoba Teachers’ Society (MTS) may choose to use this approach to develop the leadership skills of their members, particularly those who take on leadership positions within member associations or the provincial executive. This could further leadership for social justice at the provincial level within the society and the larger educational community. The Council of School Leaders (CoSL), an affiliate member of MTS, may choose to utilize such a model to assist school-based administrators to gain allies and insight into leading for socially just outcomes in schools. Teacher leaders could be identified by individual divisions and supported to participate in

a leadership development program built on this model; participants would be well situated during and afterwards to contribute to leadership in divisions on an incremental basis. Superintendents, through the Manitoba Association for School Superintendents (MASS) may also be interested in using the leadership development model as part of succession planning. MTS, COSL and MASS have all expressed interest in leadership development through inquiry as well as furthering socially just practices in schools. Manitoba Education, and the associated office of the Manitoba Educational Research Network (MERN) could build on this study by supporting research-based leadership development studies in different contexts throughout the province. The model could be easily adapted to a specific rural or northern focus in and beyond Manitoba. It has particular potential for use by divisions in isolated areas where accessing quality professional development can be difficult and expensive.

5. *Transferable tools.* The SJTLSA and SJTLPR developed through this study have potential for application in other leadership development initiatives focused on developing leaders for social justice.

SJTLSA as a secondary rhizome. The SJTLSA served as a form of fertilizer or compost for the group which accelerated growth. Posing the questions, discussing them together and using them as tools for reflection stimulated further growth of ideas. There was cross-pollination as people shared their insights. As a tool, the SJTLSA has uses beyond this study:

1. Both tools can be used by school teams interested in discovering how compatible their practices are with social justice behaviours. The SJTLSA tool could help schools establish baselines, stimulate dialogue and assess growth.

2. Individual educators may choose to use the self-assessment tool as a guide for self-reflection, performance appraisal and goal setting.
3. School leaders have indicated they could use the tool statements as aspirations for their leadership practice.
4. The SJTLSA has been identified as a potential tool for preparing teacher candidates and cooperating teachers for discussions around social justice pedagogy (Personal conversation, V. Mulholland, June 5, 2013).
5. Individual segments of the tool could be useful for stimulating dialogue in groups around topics of related interest. For example, completing the Knowledge section might help a group of teachers identify learning targets for their professional learning group for a period of time. Completing the Dispositions section might lead into a discussion of varying strengths amongst a group of colleagues and help plan for effective use of each person's assets. The entire tool was used with a Social Justice Study Group to prepare participating teachers for an international service experience in Latin America (Mission to Mexico, www.ourmissiontomexico.com).
6. The SJTLSA could be used in pre-service education programs to help students identify notions of equity and leadership.
7. Colleagues may choose to provide each other with feedback and open up new areas for dialogue by completing the SJTLPR on each other.
8. The tool can be incorporated into leadership development courses with aspiring teacher leaders and administrators and be used to support leadership for social justice in schools.

The possible applications of the SJTLSA tool listed above suggest that one significant outcome from this study is the tools which have been created for fostering dialogue around challenging issues associated with social justice leadership. Stimulating dialogue and an understanding of social justice leadership inevitably leads to the topic of sustainability.

Sustainable growth. The outcomes of the study and the flowering iris are represented in the top layer of the diagram called sustainable growth. This association is relevant because the outcomes are linked with ongoing learning and growth over time. The cohort community has the potential to support individuals as their leadership grows and changes over time. Their transformative experiences, frameworks for action and sustainable engagement have the potential to contribute to change as the individuals, their experience and their contexts change. The visible part of teacher leaders' work is at this level, their actions in their schools and communities which are visible to the casual observer. The impact and outcomes of the study shown in phase three can be thought of as this sustainable level of growth. The prior work, the depth of understanding and experience which leads to the flowering of the iris and its ability to flower in hostile contexts however, is a result of the underground work represented by the rhizomes and the roots. The dual directional arrows between the phases are reminders that while agency is strengthened by skill development through the leadership development sessions, leadership for social justice also requires a deep understanding of the systemic roots of inequity.

Similarly on the macro level, the evolution of a school community towards social justice is the culmination of a long sequence of influences on individuals over extensive

periods of time. Educators do not become critical overnight. They *can* however experience disequilibrium when they wrestle with incompatible realities. Critical reflection on these unsettling experiences can lead to great leaps of insight which resolve personal dilemmas (Mezirow & Associates, 2000). This process will lead to individuals flowering at different times and under different circumstances. School communities likewise need repeated exposure to challenging ideas to evolve into more progressive institutions. Rhizomes can store the potential for irises for a long time (McCracken, n.d.). When conditions are right they flower. They do not like to be contained in small containers, they need room to grow and space in which to spread out and flower. This speaks also to the conditions in which teacher leaders flourish.

Sandy soil. Irises thrive in sandy loamy soil (Toop & Williams, 1997), and do not need rich black highly nutritious soil in which to grow. Similarly, teacher leaders for social justice can foster change in less than ideal circumstances. Rhizomes can grow around obstacles, break off and regroup when they encounter barriers. Similarly teacher leaders can re-organize, redirect their efforts and foster further growth through being responsive and resilient. Rhizomes are strongest however when they have strong systems of roots and are interconnected with each other. Similarly teacher leaders for social justice do their best work when they have strong networks with like-minded colleagues. The TLSJ cohort provided participants with the opportunity to forge these networks to sustain them in their leadership for change over time.

Different soil types produce different types of irises. Similarly the skills and attributes of teacher leaders for social justice vary according to the context and system in which they are operating. As each participant found a way to engage in action research in

their school, they identified effective strategies for agency within their personal context. With the support of the group they were able to work around obstacles, accelerate their impact and sustain their efforts. They learned from each other and worked together to form strong networks of support and knowledge to sustain them when they encounter hostile environments.

Rhizome theory, developed by post-modern philosopher and psycho-analyst duo Deleuze and Guattari (1987), challenged the dominant tree metaphor associated with linear and hierarchical patterns of thought. Features of rhizomes which inspired Deleuze and Guattari's theory include their multiple and essential points of connection (heterogeneity), the ability to regenerate after rupture, and the tendency to create new paths (cartography) rather than replicate existing patterns (decalcomania). These principles capture the nature of rhizomes as non-linear, non-hierarchical and organic. Rhizomatic growth therefore is complex, random and unpredictable. Strom and Martin (2013), used rhizome theory and rhizomatic analysis to problematize teaching for social justice in a neo-liberal environment through a self-study co-autoethnography. They found rhizome theory helped them to seek and identify multiple perspectives and interpretations of their on-line self-study journals. The iris rhizome metaphor identified in this dissertation incorporates the spontaneous, unpredictable and multi-directional nature of rhizomatic growth described by Deleuze and Guattari and the association of rhizome theory with social justice education by Strom and Martin. Yet the iris rhizome metaphor which evolved through this study is also a literal and organic metaphor which associates rhizomes with the part of the iris plant which generates new growth.

The Iris Leadership Development Model

I have described how Figure 49 integrates the literature review, research methodology and results of the study into one final graphic. The only missing element to this point from the research design described earlier is the theoretical framework.

Embedding the theoretical framework. The three theoretical frameworks of critical constructivism, reflective practice and change theory are also captured in this graphic.

Reflective practice. Reflective practice is indicated by the choice of hexagons in the design and layout of the model. Hexagons were chosen because they have multiple lines of symmetry and because they tessellate, which means they can be assembled side by side without leaving any blank space. Tessellating hexagons represent complimentary and closely related ideas and suggest an interdependence. In the center of phase two of the model, which I have referred to as the rhizome, the larger shape formed of seven hexagons has a horizontal line of symmetry. If you imagine folding the top half of the shape down to cover the lower half, you will discover that the top and bottom sections of this phase represent the same aspects of the study just one is the input and the other the output. The second part of the theoretical framework is critical constructivism.

Critical constructivism. Critical constructivism is composed of social constructivism, complexity theory and critical theory. All three aspects are present in the model. The social constructivist aspect is represented by the rhizome of the iris where critical reflection occurs and critical consciousness is developed. These practices are dialogic, linguistically based and highly interactive, thereby reflecting the principles of social constructivism.

Complexity theory explains the random spread and growth of social justice through the highly self-organizing rhizomes. Their offshoots may surface immediately, next season or far in the future. Complexity theory describes this growth as “emergent and self-organizing” (Kincheloe & Berry, 2005, p. 37). Teacher leadership for social justice creates change in the same unpredictable, unsupervised and sporadic manner.

Critical theory is reflected in the iris diagram to which the model is compared. The root system of the iris is a reminder that systemic inequities in society are deeply rooted. Institutionalized inequities are persistent, resistant to destruction and pervasive. It is only through equally deep reaching responses such as the fierce conversations of TLSJs that those deep ideas can be challenged. Teacher leaders for social justice dig deep and like irises, “are tenacious survivors in all kinds of conditions”.

Change theory. The purpose of the leadership development model which has been refined through this study is to stimulate change in schools by developing the skills of teacher leaders as change agents. What became clear through conversations with the teacher leaders in the cohort was that every aspect of leadership and leadership development takes place within a context of change. Cohort experiences support the relevance of change theory. They were creating change through their action research projects, developing leadership capacity in themselves and others to create change in the future and did so while negotiating change themselves. They responded to internal dissonance, external reach in and push out factors, and provided leadership (Smith, 2011). They reflected their local context, developed capacity in themselves and others and engaged in challenging conversations (Fullan, 2008; Smith, 2011). In the process they engaged in shared problem solving, focused on equity as critical, utilized and

experienced socio-cognitive leadership and learned from critical reflection (Kelley & Shaw, 2009). The targets teacher leaders pursued in their action research were influenced by events in their classrooms, their personal lives, their school, their communities and global issues. Strategies that were effective at one time required revision and adaptation with different groups and for different purposes.

The element of the graphic which represents the context of change is the physical ecosystem in which irises grow. As moisture in the soil changes, density in the plant population increases or temperature alters, the iris plant has to respond. At times this requires sending out deeper roots, sometimes it means going into a dormant state until conditions improve, and sometimes change agents respond by reaching out to other organisms to work together to create change. Rhizomes expand horizontally and send out new roots and shoots in search of more hospitable conditions. The iris is an adaptable plant which is resilient in varied conditions. Despite the short duration of each bloom, as one flower dies another is ready just below on the stem to take its place. Teacher leaders for social justice, like irises, thrive and beautify the landscape when given opportunity and the support of healthy growing conditions.

Limitations of the Iris Metaphor

The metaphor of the iris is useful because it represents how change agents contribute to increased awareness and understanding of social justice in communities. Yet despite its value this metaphor, like all others, has limitations. The iris metaphor may mislead, ignore, imply or overemphasize certain attributes of the change process which may be inaccurate or potentially misleading (Morgan, 2006). The iris metaphor misleads because it suggests that individual change agents are the only stimuli which can create

change. The metaphor ignores the need for the collaborative and collective actions of social movements to create change and the potential catalytic impact on individuals of transformative learning experiences. The iris metaphor ignores the impact of resistance, conflict, competing agendas and political climate on agents of change by suggesting that social justice is the only agenda being promoted through dialogue and interpersonal communication. Strong neo-liberal forces are at work competing to convince people of alternative perspectives and they often have the advantage of access to business capital and popular media to further their ideas. These competing interests make the work of change agents for social justice more challenging, demanding and stressful. The use of a perennial plant like the iris as a metaphor implies that social justice will naturally be sustained over time, like a plant that resurfaces each spring, without any ongoing effort. The reality is that left alone irises will choke out other growth and eventually stunt their own. For sustained healthy growth over time, change agents and communities need space, diversity and different perspectives or species to develop strong communities. The iris metaphor also ignores the need for learners to experience disequilibrium to foster growth and transformation. Despite these limitations the iris metaphor carries potential for helping people to envision the change process conceptualized in this study.

Summary of Chapter Eleven

In this chapter I explored the significance of the findings generated from this study. I used theory to explain why I aligned the leadership development model which emerged in Chapter Ten with the metaphor of an iris plant as well as the limitations of this metaphor. The soil in which the iris grows is variable and changes over time. It is influenced by the surrounding organisms, other parts of the ecosystem and an ever-

changing climate. The deep roots of the plant represent the foundational ideas for the study in social justice, leadership development and teacher leadership. They also represent the deep systemic causes of inequities in society and the intense work required to create change. The central rhizome represents the hub of innovation in which participants were transformed through critical reflection, dialogue and multiple cycles of action-based inquiry. This rhizome has the potential to stimulate further growth if others are influenced by one of the participating teacher leaders, apply or modify the leadership development model, adopt or build upon the learning and community building strategies used during cohort sessions, adopt the action research strategies employed, or choose to make use of the STJLSA and SJTLPR tools in any number of ways.

As a model for creating change agents, this central rhizome has tremendous potential for fostering sustainable growth. The top level of the model represents the outcomes for participating teacher leaders. By creating transformative experiences, identifying frameworks for action and fostering sustainable engagement, the Iris Leadership Development Model develops teacher leaders for social justice through community, critical reflection and change.

Chapter Twelve: Conclusions, Implications and Recommendations for Further Research

Summary of Chapters One to Eleven

In Chapter Eleven I explained the theoretical understandings which underpin the leadership development model and the leadership development sessions described in detail in this dissertation. In this last chapter I will present my conclusions, identify contributions of this research to the scholarly literature, and explore implications and suggestions for further research. The chapters are clustered into four groups in this dissertation: the foundations upon which it was designed (Chapters One to Four), the enactment of the study (Chapters Five and Six), answers to the research questions (Chapters Seven to Ten) and the interpretation, conclusions and implications of the study (Chapters Eleven and Twelve).

The foundations upon which this study was designed were described in detail in Chapters One to Four. I began in Chapter One by illuminating my theoretical sensitivity and suitable positioning to conduct the study through a personal autobiography. The literature reviewed in Chapter Two was selected to establish the need for the study, shape its design and create a conceptual model. In Chapters Three and Four I outlined the theoretical framework, research methodology and methods which guided the study. The initial conceptual model shown in Figure 6 (p. 91), as well as my research methodology, methods and theoretical framework, was based on the literature considered in these chapters. Throughout this dissertation I provided rich, thick descriptions about how I applied these recommended processes and practices in my research.

The second cluster of chapters, Chapters Five and Six, described the enactment of the study. Specific and detailed description fleshed out how the previously identified procedures were implemented. Chapter Five delineated the process used to develop and field test the self-assessment (SJTLSA) and peer review (SJTLPR) tools. Chapter Six elaborated in detail the ten step process I used to facilitate, guide and analyze the action research cycles through which I studied my facilitation of the six full day leadership development sessions. I examined the contribution of each step in the research process and shared findings generated through analysis of each data source.

Chapters Seven through Ten, the third grouping, focused on answering the four research questions, respectively. Herein, I outlined the strategies used to illuminate comprehensive answers to each question. Chapter Seven focused on identifying the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools. It also revealed important teacher leaders' agency behaviours including strategies, relationships, beliefs and the use of frameworks. Chapter Eight targeted the critical reflection elements of the leadership development model that assisted teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools. The seven critical elements which supported their professional learning were journaling, action research, learning-focused conversations, dialogue, self-assessment, peer feedback and critical reflection. The importance of each element was identified, explored and explained in Chapter Eight. Chapter Nine addressed how participation in a co-constructed community of practice supported teacher leaders in acquiring the knowledge, skills and dispositions identified as essential in Chapter Seven. Key factors involved in co-constructing an effective community included the characteristics of

individuals and the group, sufficient time and the use of effective processes. The benefits for participants of the four aspects of the co-constructed community were identified as appreciation and validation, belonging and challenge, meaning and sustenance, and, ultimately, leadership capacity. Chapter Ten described the leadership development model which enabled teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools. This three phase model was presented by first articulating the program design and intent, spelling out the enactment phase including cohort features and content, and finally identifying the impact and outcomes of participation in the teacher leadership for social justice cohort.

The fourth and final cluster, Chapters Eleven and Twelve, focus on the interpretation and implications of this study. In Chapter Eleven I aligned the leadership development model with a drawing of an iris plant, using the metaphor to articulate and revisit the theories which help explain how learning and change occurred throughout the research process and is likely to occur in the future. In Chapter Twelve I aim to draw conclusions, suggest implications and identify related topics requiring further research.

Chapter Twelve Overview

The purposes of this chapter are to illuminate conclusions drawn from this study, compare the findings to the existing literature, identify the unique contributions of this research to scholarship, determine specific implications of the study and make recommendations for further research. First, I present the conclusions drawn from the research findings. Second, I focus on the variations and nuances discovered, when comparing what is known within the existing literature to my findings and identify individual frameworks which closely align with those findings. Third, I state the unique

contributions of this action research study to the literature. Fourth, I describe possible implications of this work for teacher leaders, facilitators of adult learning, theory, research and scholarship. Finally, I recommend topics for subsequent research which will build upon the questions and conclusions emerging from this research study.

Conclusions

In this section I draw conclusions from different facets of this research study. These conclusions derive from my collection, analysis, interpretation and theorizing of the multiple forms and sources of data collected as part of the action research process. These concluding statements provide a brief synthesis of what was learned through this research. Further elaboration on specific conclusions can be found in the corresponding chapters of the dissertation. There are three different types of findings: findings related to the research process, findings which confirm what is in the current literature on social justice, teacher leadership and leadership development and findings of perceived significance which have emerged from this study.

1. Research. The action research processes followed in this research study had many different components. The dialogic orientation, focus on reflective practice and use of multiple cycles of inquiry necessitated careful data collection, management, analysis and interpretation processes. These conclusions summarize what I learned specifically from this multi-cycle, multi-phase action research process.

- 1.1 Visual and tactile manipulation of items facilitates sequencing, categorization, analysis and interpretation.
- 1.2 Recruiting a diverse yet fixed-size cohort requires researchers to balance multiple variables.

- 1.3 Committing to dates for leadership development sessions well in advance of the school year resulted in excellent participant participation and ongoing support from school administrators.
- 1.4 Hosting learning development sessions in a comfortable, neutral location with nutritious food enabled participants to achieve and sustain the mindset necessary to engage in deep thinking and critical reflection.
- 1.5 Detailed descriptions of process and reasoning illuminate the critical social justice and participatory action research principles honoured, specifically reciprocity, reflexivity and transparency.
- 1.6 The researcher's action research cycles refined direction and established a process for documentation and analysis of multiple data sources.
- 1.7 Sharing the researcher's action research cycles with participants modeled AR and clarified the relationship between data analysis and planning.
- 1.8 Participating in an AR experience while conducting AR themselves was educational, empowering and supportive for participants.
- 1.9 Keeping the content, methodology and strategies used in leadership development sessions emergent empowered participants and reduced the power of the researcher.
- 1.10 Agendas for leadership development sessions provide vision and structure.
- 1.11 Facilitation guides effectively capture thinking done in advance of leadership development sessions and ensure facilitators stay true to the intended purpose and structure of individual learning experiences.
- 1.12 The researcher's checklists prompt careful attention to logistics and refinement of research techniques.

- 1.13 Videotaping leadership development sessions documented verbal and non-verbal communication. Transcribing the videos ensured participant and researcher voices were accessible for analysis.
- 1.14 Analysis of participant feedback provided specific direction for content, process and facilitation of subsequent leadership development sessions.
- 1.15 Participants engaged in meta-analysis of shared learning, and influenced and enriched the research findings by revising the cumulative themes during leadership development sessions.
- 1.16 The researcher's oral reflections facilitated exploratory and speculative thinking during all stages of the research process.
- 1.17 Reflecting frequently on the research questions helped maintain fidelity and captured emerging understandings.
- 1.18 Reflecting on the research process in writing provided a way to negotiate obstacles, explore multiple potential paths and determine next steps.
- 1.19 Logic models organized data and facilitated comparison and analysis between leadership development sessions.
- 1.20 The session summaries provided a manageable account of each session and defined where one action research cycle ended and a new one began.
- 1.21 The ten step methodology used to study facilitation of the leadership development sessions effectively supported and guided the researcher's inquiry.
- 1.22 Through multiple cycles of reflexive practice the data was examined from diverse perspectives which deepened understanding, insight and interpretation.

2. Confirmability and consistency with the literature. An extensive body of literature was reviewed for this dissertation and there was a strong resonance between the literature and what was learned during various phases of the research. These conclusions summarize specific aspects of the research study which strongly echo or confirm perspectives described earlier in the review of related literature.

- 2.1 Teacher leaders are powerfully positioned to be change agents as a result of their personal, positional and relational power.
- 2.2 Use of a detailed design frame supports facilitators in clarifying purpose and expectations for groups and selecting and aligning learning experiences.
- 2.3 Teacher leaders benefit from engaging regularly in critically reflective practice.
- 2.4 Critical reflection supports learning, transformation and understanding.
- 2.5 Like other social justice activists described in the literature, teacher leaders need access to supportive networks.
- 2.6 Working for social justice can be emotionally demanding and make one's work site very uncomfortable, therefore self-care is of critical importance for teacher leaders engaged in social justice leadership work.
- 2.7 Engaging in action research empowers practitioners to see themselves as competent and capable researchers.
- 2.8 Participant researchers pay careful attention to issues of power within groups and facilitate opportunities for participants to offer critical feedback.
- 2.9 Facilitators of adult learning need to combine emergent content, responsive facilitation, as well as strategic and predictable design to maximize time, safety, input and impact.

- 2.10 The value of using constructivist learning processes with adults as identified in the literature was further confirmed through this study.
- 2.11 Consistent with the literature, strategic design of leadership development sessions was strengthened by setting task, relationship and group outcomes.
- 2.12 Facilitating leadership development sessions with little use of computer technology intensified focus and kept sessions dialogic.
- 2.13 Responsive facilitators of adult learners carefully monitor the energy level, intensity and activity level of groups, make necessary adjustments and include participants in decision-making.
- 2.14 Features of supportive networks identified previously in the literature were further confirmed through this study.
- 2.15 The cohort community co-constructed through the context of this study meets the criteria for various descriptions of effective learning communities identified in the literature.
- 2.16 Five categories of frameworks guided the research and the leadership development sessions with participants, including frameworks for: supportive networks, social justice, social justice leadership, leadership development and teacher leadership.
- 2.17 Frameworks for leadership, social justice, equity and agency help people to organize their thoughts, set priorities and determine their next steps.
- 2.18 Strategies mentioned in the literature for developing leadership capacity were found to be effective.
- 2.19 Principles and frameworks for social justice previously identified in the literature were upheld in the context of this study.

2.20 The iris rhizome metaphor identified in this dissertation is congruent with rhizome theory and its previous association with social justice education in the literature.

Significance. This study aimed to explore gaps in the existing research literature as well as create new knowledge concerning how best to prepare teacher leaders to be school-based change agents for social justice. These conclusions summarize what has been learned from this study that makes a significant and meaningful contribution to the existing literature. These conclusions of significance are presented in the same order as topics were discussed in the dissertation.

3. Tool development and recruitment. The self-assessment and peer reflection tools used during the leadership development sessions were developed during phase one of this study and were carefully designed to stimulate self-reflection, awareness and dialogue. Participant recruitment for this study required the cooperation of a number of provincial educational organizations. Sampling strategies were selected to identify a diverse group of teacher leader participants from school divisions across the province.

3.1 The SJTLSA and SJTLPR tools are valuable resources for stimulating reflection, self-assessment and dialogue within educational communities.

3.2 Complexity theory offers a good explanation for the synergistic quality of focus groups used in tool validation.

3.3 To facilitate their involvement in this study, the provincial teachers' association developed for the first time procedures for participating in recruitment of research participants.

3.4 Partnering with educational organizations for participant recruitment is complex and time consuming yet worthwhile.

- 3.5 The emergent quality of the leadership development sessions appealed to participants and influenced their decision-making during the recruitment process.
- 3.6 Participants in the TLSJ cohort also belong to other communities in which they develop leadership skills.
- 3.7 Participants' diverse teaching contexts enriched dialogue and ensured a focus on social justice leadership.

4. *Process folio of the researcher's action research inquiry.* The process-folio presented the detailed steps taken to collect, analyze and interpret data during the leadership development sessions and their associated action research cycles.

- 4.1 A process-folio is an effective, detailed and focused process that can be used to outline data sources and analysis, track process, and capture thinking and decision-making within an action research study with multiple cycles of inquiry.
- 4.2 The ten step data collection and analysis procedure used to document process, content and occurrences through multiple research cycles consists of: researcher's action research cycles, session agendas, facilitation guides, researcher's checklists, participants' response to activities, participants' reflections, researcher's reflections, logic models, session summaries and cumulative themes.
- 4.3 The researcher's action research methodology built upon prior experience, ensured a critical reflective stance, and modeled action research for participants.
- 4.4 The ten-step research methodology used to study my own practice constitutes a unique process for facilitator self-study which may be useful to researchers or practitioners in similar situations.

- 4.5 The cumulative themes facilitated synthesis and analysis of session findings and documented emergent insights into the research questions.
- 4.6 Processes such as logic models, researcher's action research cycles and cumulative theming enable facilitators of leadership development programs to be transparent about their thinking, decision-making and process and accountable to participants.
- 4.7 A proposed new hybrid positionality, "insider outsider reciprocal collaboration" provides an accurate description of the researcher's position in this study.

5. Knowledge, skills and dispositions of teacher leaders for social justice. The first research question asked: What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools? Conclusions listed below in response to research question one emerged from the tool development process (including contents of the SJTLSA and SJTLPR) and the leadership development sessions and insights into change agency demonstrated by participating teacher leaders.

- 5.1 The theory-in-context (Figure 34) generated through this study articulates the knowledge, skills, dispositions, strategies, beliefs, relationships and frameworks which support teacher leaders in operating as change agents in schools.
- 5.2 To be effective change agents in schools, teacher leaders require knowledge of social justice and leadership, various frameworks for creating change and learning, and the characteristics of collaborative and collegial groups.
- 5.3 The skills that empower teacher leaders to be critical change agents in schools are: knowing how to facilitate groups, dialogue, and problem-based conversations, how to use critical reflection to create positive change, and how to develop strong relationships and leadership capacity in others.

- 5.4 Teacher leaders who are empathetic, passionate, optimistic and analytical have the dispositions to be change agents in schools.
- 5.5 Teacher leader participants demonstrated agency through their belief in inclusion, equity, empathy and growth.
- 5.6 Teacher leader participants demonstrate agency through using strategies for action, sustainability and teacher leadership.
- 5.7 Teacher leader participants demonstrate agency through active listening and developing and sustaining non-judgemental relationships with peers.
- 5.8 Teacher leaders for social justice use a variety of frameworks to organize their thinking about complex topics and guide their practice.
- 5.9 Teacher leaders for social justice enact agency in constantly changing and dynamic contexts within schools, teacher associations, professional organizations, families and local communities.
- 5.10 Teacher leaders for social justice struggle to demonstrate consistency between beliefs, values and actions in their professional and personal lives.
- 5.11 Teacher leaders for social justice expect the schools and divisions where they work to demonstrate consistency by ensuring their actions are congruent with their social justice and equity policies.
- 5.12 Leading for social justice in an atmosphere where leadership is not distributed broadly is both difficult and challenging.
- 5.13 Teacher leaders who raise issues about long-standing school practices, advocate for students to be treated equitably or promote inclusive practices may upset, annoy or be threatening to their colleagues.

6. Elements of the leadership development model. The second research question was: In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools? The following conclusions respond to this question using findings from the leadership development sessions including lessons learned about facilitating adult learning.

- 6.1 Seven elements that facilitate reflective practice and make unique contributions to adult learning are: journaling, action research, learning-focused conversations, dialogue, self-assessment, peer feedback and critical reflection.
- 6.2 Journal writing prepared study participants to engage fully in critical reflection, deepened their understanding, and facilitated synthesis and consolidation of learning.
- 6.3 Journals facilitate reflection, provide privacy, capture emotion and serve as mnemonic devices.
- 6.4 Participants' action research cycles directed a process, enhanced focus, documented change and made learning visible.
- 6.5 Teacher leaders strengthened their leadership by learning about and engaging in action research within a community of peers.
- 6.6 Teacher leaders need frequent opportunities to engage in learning-focused conversations with skilled colleagues.
- 6.7 Participating in learning-focused conversations enhances clarity, develops skills, clarifies vision and develops agency of teacher leaders.

- 6.8 Teacher leaders need opportunities to develop professional skills in facilitating learning-focused conversations.
- 6.9 Learning focused conversations became more than a strategy to support participants and became a powerful area for skill development.
- 6.10 Engaging in dialogue helped participants to process content and experiences, move through the stages of transformative learning and connect personal experiences to theoretical ideas.
- 6.11 Dialogue assisted participants to explore new ideas, share personal experiences, find commonalities and provide emotional support for one another.
- 6.12 Collaborative dialogue helped cohort members understand a variety of perspectives, deepen their own understanding of issues and processes and generate new inquiries to inspire further exploration and change.
- 6.13 Engaging in dialogue within a community of like-minded peers provides validation, inspiration, connection and insight.
- 6.14 Completing the SJTLSA helped cohort members initially to identify themselves as teacher leaders and change agents.
- 6.15 By breaking down the different elements of teacher leadership for social justice, the SJTLSA tool allowed members to reflect on their attitudes and practice, identify strengths and weaknesses, and gain perspective.
- 6.16 Individual items in the SJTLSA stimulate and sustain critical and reflective thinking over time.
- 6.17 Many of the teacher leader participants had strong emotional responses when asked to reflect on the climates in their particular schools.

- 6.18 Peer feedback received from colleagues outside of the cohort provided perspective, balance, awareness and validation.
- 6.19 Peer feedback from co-participants was encouraging and uplifting, normalized participants' beliefs and provided them with reassurance.
- 6.20 Teacher leaders develop agency through critical reflection and dialogue, conducting action research, experiencing and facilitating learning-focused conversations, self-assessment and peer feedback.

7. Co-Constructed cohort community. My third research question was: How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice? The following conclusions represent what was learned about the nature of that experience and the characteristics of the co-constructed cohort community.

- 7.1 The seven productive processes which co-construct and enrich critical cohort communities are: sharing facilitation, sharing learning, sharing feedback, profiling group dynamics, participant reflections, sharing circles and activity breaks.
- 7.2 Sharing facilitation of a group shares power with participants and builds ownership.
- 7.3 Inviting participants to share academic and experiential learning builds on the strengths of individual members of a cohort and co-constructs community.
- 7.4 Learning about effective groups and the group's profile helped members understand themselves and each other better and maximized drawing upon diverse skills and talents for the benefit of the cohort.
- 7.5 The sharing circle is an effective closing strategy for each session because it is supportive, personal and inclusive.

- 7.6 Activity breaks during leadership development sessions enhance understanding of each other's individuality, strengthen relationships and subsequently dialogue.
- 7.7 Activity breaks help energize a group, prepare them for challenging and difficult tasks and increase alertness.
- 7.8 Participants reported more in-depth meaningful conversations with people in the cohort than they had experienced throughout their working careers, even with long-term colleagues.
- 7.9 Cohorts of like-minded individuals generate richer ideas collectively than individually through the process of synergy.
- 7.10 Contributions and suggestions for leadership development sessions from cohort members led to some of the most successful shared learning experiences.
- 7.11 Four factors which influence the co-construction of a critical cohort community of practice are: the characteristics of the individuals, the characteristics of the group, their group interaction over time, and carefully selected, facilitated processes.
- 7.12 Individual study participants displayed optimism, commitment, passion, knowledge and generosity, all of which are characteristics which correlate positively with co-constructing a cohesive community.
- 7.13 Participants described feeling a sense of acceptance and validation from meeting others who shared their convictions.
- 7.14 As a group the TLSJ cohort was open, trusting, inspiring, risk-taking and like-minded which facilitated community building.
- 7.15 Being a member of the cohort community helped participants feel a sense of belonging that supported them in issuing and accepting cognitive challenge.

- 7.16 Critical communities grow through planned, focused, protected, extensive and sustained time together.
- 7.17 The extensive amount of time research participants spent together made their shared experience meaningful and supportive.
- 7.18 Strategic processes which facilitate the growth of a strong cohort community are: varied, strategic, participatory, incremental and invitational.
- 7.19 Participants reported that the processes used to develop the cohort community strengthened their leadership capacity.
- 7.20 The leadership development sessions and the co-constructed cohort community are “holding environments” in which adult learners are both supported and challenged.
- 7.21 The leadership development sessions provided a “third space” for social justice dialogue between participants in the study.
- 7.22 It is essential that teacher leaders for social justice have networks for support and challenge in which to develop their visions of a socially just world, develop knowledge and skills and enhance their personal wellness.
- 7.23 Individual teacher leaders engaged in social justice work desperately need ongoing networks for emotional, practical, ideological and political support.
- 7.24 The TLSJ cohort forged networks to sustain teacher leaders in their pursuit of change over time.
- 7.25 Strong relationships that developed between participants in the cohort community became catalysts for change beyond the leadership development sessions.
- 7.26 Participating in a co-constructed community was a critical and positive feature of the leadership development experience for teacher leaders.

7.27 Time spent in learning with other cohort members challenged participants to be more effective and strategic in their work.

8. Leadership development model. The fourth research question posed in the study was: What leadership development model enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools? This section is divided into three parts, the leadership development sessions, the leadership development model and the iris leadership development metaphor.

Leadership development sessions. Conclusions in this section articulate the features of the leadership development sessions valued by participants and the impact of participation in the leadership development sessions on participants.

8.1 Participants benefited from leadership content that focused on: personal growth, finding direction, engaging others through working with groups, the change process, developing leadership capacity and experiences of leadership.

8.2 For study participants, sustainability, wellness and equity were knowledge areas of critical importance.

8.3 For study participants, crucial conversations, paraphrasing and transformative learning were significant learning experiences.

8.4 Teacher leader participants valued having conversations with like-minded people, the time and space for those conversations to occur and the time to write in journals during leadership development sessions.

8.5 Time spent together learning within the leadership development sessions was significant because the learning was well paced and ongoing throughout the sessions.

- 8.6 Developing critical consciousness takes time and multiple exposures to critical concepts.
- 8.7 Leadership frameworks provide research-based approaches to planning, and offer “tried and true” strategies; they help participants conceptualize issues and develop plans for action.
- 8.8 Frameworks introduced for one purpose in the leadership development sessions were effectively adapted for other purposes by participants.
- 8.9 This study addresses a specific gap identified in the literature by focusing on how teacher leaders negotiate power, use alternative forms of leadership and influence colleagues.
- 8.10 The leadership development sessions assisted each participant to identify generally as a leader, and specifically as a teacher leader and change agent.
- 8.11 Participation in the TLSJ leadership development sessions helped develop emotional resilience; participants identified an increased sense of wellness and ability to sustain their engagement in social justice leadership.
- 8.12 Participating in leadership development sessions and engaging in action research, enhances teacher leaders’ comfort in leadership roles and better equips them to create change.
- 8.13 Leadership development sessions and engaging in action research provided participants with the time and space to develop social justice praxis.
- 8.14 Participation in leadership development sessions and job-embedded action research positively impacts participants’ school communities including students, teachers and families.

- 8.15 As a result of participation in the leadership development sessions, study participants increased their willingness to be leaders, personal commitment to leadership and capacity for sustainable engagement.
- 8.16 The leadership development sessions created transformative experiences, identified frameworks for action and fostered sustainable engagement.
- 8.17 The leadership development sessions enabled participants to learn about leadership, equity and agency frameworks.

Leadership development model. The following conclusions are drawn from the leadership development model (Figure 47) which reflects what has been learned through this research study about developing teacher leaders for social justice.

- 8.18 Figure 47 synthesizes the design, enactment and impact of the leadership development process.
- 8.19 The intent of the leadership development model is to outline a process which will enable teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools.
- 8.20 The three critical strands of the leadership development model are teacher leadership skills, leadership knowledge and a social justice community.
- 8.21 Phase one of the model includes the program design, criteria for recruiting participants and the intent of the leadership development program (Figure 42).
- 8.22 Suitable participants for a cohort designed to develop the agency of teacher leaders for social justice display ideological beliefs in diversity, equity, excellence and empowerment.

- 8.23 The ideal teacher leadership for social justice cohort is voluntary, accessible, valued, diverse and facilitated.
- 8.24 Leadership development sessions designed to build teacher leaders' agency should develop participants' skill in facilitating critical, reflective, transformative and appreciative dialogue with colleagues.
- 8.25 Teacher leaders for social justice benefit from learning about distributed leadership, teacher leadership, transformative leadership and social justice leadership.
- 8.26 A co-constructed community of teacher leaders will provide opportunity, support, challenge and vision for participants.
- 8.27 Phase two of the model includes the features of the leadership development model as implemented, and identifies the features participants found to be essential (Figures 43 and 44).
- 8.28 Phase three of the leadership development model includes the impact on participants, research outcomes and agency of participating teacher leaders (Figure 46).
- 8.29 Agency of participants increased as a consequence of transformative experiences, exposure to frameworks for action and a community to support sustainable engagement.
- 8.30 The modular structure of the leadership development model facilitates improvisation and maximizes flexibility and transferability to other contexts.
- 8.31 In Figure 47 reflective practice is indicated through the choice of symmetrical and tessellating hexagons in the design and layout of the model.

- 8.32 Teacher leadership is enacted in distributed leadership environments and amidst the context of change.
- 8.33 The learning strategies and principles of community in phase two of the leadership development model are critical to its effectiveness.
- 8.34 The leadership development model resulting from this study is a theory of action for how to develop critical agents of change; unlike previous models this one focuses on developing teacher leaders for social justice.
- Iris leadership development metaphor.* Figure 49 aligns a drawing of an iris plant with the leadership development model previously discussed to draw analogies between the rhizomatic nature of the iris plant and the development and agency of teacher leaders for social justice. Conclusions in this section use the iris metaphor to explain and interpret the research findings and the phenomenon of leadership for social justice.
- 8.35 The iris metaphor (Figure 49) is a theoretical construct for developing teacher's leadership and agency that interprets how the leadership development model creates change through community, critical reflection and action.
- 8.36 The iris plant metaphor illustrates how the majority of "work" in creating social justice is messy, difficult and hidden just below the surface.
- 8.37 The natural image of the iris represents the organic nature of social justice work which is both situated in and responsive to its context.
- 8.38 The roots of the model represent the stage in the planning process in which facilitators articulate the purpose of a program, determine the qualities they wish to see in participants and identify the most appropriate participants.

- 8.39 The root system of the iris is a reminder that critical theory explains how systemic inequities in society are deeply rooted.
- 8.40 The rhizome level represents the enactment phase during which particular innovations are applied in the leadership development sessions that contribute to participants' growth.
- 8.41 The rhizome phase occurs when critical reflection and critical consciousness are developed through social construction of knowledge.
- 8.42 Complexity theory explains the random spread and growth of social justice through emergent and self-organizing rhizomes.
- 8.43 The context of change is defined as the physical ecosystem including the soil in which an iris grows.
- 8.44 The flowering iris represents the outcome phase during which sustainable growth occurs and learning continues over time.
- 8.45 The iris rhizome metaphor which evolved through this study is a literal and organic metaphor which associates rhizomes with the part of the iris plant which generates new growth.
- 8.46 As a model for creating change agents, the central rhizome holds potential for fostering sustainable growth. Rhizomes can foster change in less than ideal circumstances, work around obstacles, separate and regroup when encountering barriers. Similarly teacher leaders can re-organize, redirect their efforts and foster further growth through being responsive and resilient.

- 8.47 Rhizomes are strongest when they have strong systems of roots and are interconnected with each other; similarly teacher leaders for social justice do their best work when they have strong networks with like-minded colleagues.
- 8.48 The rhizomatic nature of the iris plant metaphorically represents the potential of the outcomes of this study to influence growth and change by stimulating new growth in many directions and multiple contexts.
- 8.49 Complexity theory facilitates understanding and analysis of the multiple influences acting on participants during the study and the multiple analytical approaches employed by the participant researcher.
- 8.50 Graphic representations of findings facilitate dialogue and help integrate experience and interpretation.

These conclusions synthesize what was learned about the research process, what confirmed the existing literature and which findings are of significance from this research study. These conclusions emerged from analysis of data collected in each phase of the research study investigating what leadership development model would best prepare teacher leaders to serve as change agents in schools. In the following section I compare the research outcomes with the initial design frameworks which guided the research.

Design Frameworks Confirmed in the Research Outcomes

The conceptual model initially proposed for the leadership development program was confirmed and expanded upon through this research. What resonated most strongly in the findings were the frameworks which I identified in the literature and used to guide the study and sessions with the participants. These frameworks fall into five categories: frameworks for supportive networks, frameworks for social justice, frameworks for social

justice leadership, frameworks for leadership development and frameworks for teacher leadership.

Frameworks for supportive networks. Frameworks for establishing networks to support teacher leaders were confirmed through this study. One large scale study indicated that teacher leaders are effective because they work across grade levels and disciplines therefore their networks should reflect this diversity as well (Seashore Louis et al., 2010). Representations of such varied contexts are an important feature of the TLSJ cohort. Diversity in participants' teaching contexts contributed varied perspectives to the dialogue but also kept the conversation on the topic of social justice leadership without diverging into conversations about instructional strategies or academic programming. A second set of conditions for effective networks for teacher leaders is dedicated and sufficient time, the provision of rich professional development, and the development of strong networks for collaboration (Harris, 2003). These conditions were confirmed as important in this study; time and rich learning experiences were frequently mentioned as strengths of the model as was the strong support received from working within the group. A third condition of networks for teacher leaders is that they should focus on how teacher leaders negotiate power, what forms of leadership are effective beyond distributed leadership and how they influence their colleagues (Lewthwaite, 2011). These factors proved significant in this study. Chapter Eight explored in detail the methods that helped teacher leaders learn new behaviours, skills and types of leadership. Action research findings, peer sharing and dialogue helped participants learn to influence colleagues around issues of social justice. Chapter Nine talked about how membership in a co-

constructed community contributed to that learning. Cohort members shared openly with each other their approaches to creating change and negotiating power issues.

Frameworks for social justice. Frameworks for social justice guided the study as well as the work with participants. I used the principles of being just, empathic, democratic and optimistic (Kincheloe & Steinberg, 1995) as guiding lights during the study and found they captured not only the intent and processes used, but they also characterized the participants in the study. The frequent appearance of these concepts during the study supports their central correlation with social justice work. A second social justice framework which resonated during the study was the recommendation to examine practice, take responsibility, lead deliberately, facilitate transformative dialogue and aim to achieve socially just outcomes for all (Shields, 2004). Once again this framework was integrated and reflected on many levels. It describes the intent of my facilitation, participants' intent through their action research leadership with colleagues and the framework for social justice leadership we studied during cohort Session Four. The third social justice framework which surfaced strongly during the study was that of being equity oriented change agents (EOCA) (Skrla et al., 2009). I believe the description of EOCA's aligns closely with what I observed in cohort participants. They strove to do the following: avoid demonization, adopt and advocate an asset attitude, maintain a coherent focus, initiate conversations, and demonstrated persistence and patience. Participants did this through naming deficit thinking when they recognized it in their own thinking, pursuing a sustained focus in their action research and developing increased understanding and acceptance of slow rates of change. These three social justice

frameworks were part of the initial vision for the TLSJ, influenced its direction, and were observed across multiple data sources.

Frameworks for social justice leadership skills. Frameworks for social justice leadership skills development were integral to the study. All nine of the behaviours of social justice leaders identified by Preskill and Brookfield (2009) were demonstrated by cohort members during this study and were considered conceptually in the planning of cohort sessions. Critical reflection was at the heart of research question two and the elements identified. Collective leadership and leading for democracy surfaced when participants talked about processes for democratically run meetings and strategies for ensuring voice. Supporting the growth of others, learning how to question and how to analyze experience were demonstrated through facilitating learning-focused conversations with each other, and in the design and enactment of their action research. Learning to sustain hope in the face of struggle and to create community were greatly enhanced through participation in a cohort which exuded optimism and worked together through the process of co-constructing a community. Remaining open to the contribution of others became a touchstone for self-reflection and guided the facilitation of sessions. Preskill and Brookfield's strategies were valued as leadership practices but were also appreciated as strategies for creating change.

The results of this study also solidly aligned with a second framework for social justice leadership identifying the types of transformative professional development leaders (Kose, 2005; 2009). All five types of transformative leaders were recognizable in the choice of action research focuses of cohort members. Transformative visionary leaders took a whole school focus and adopted an asset orientation in their work.

Transformative cultural leaders worked to strengthen school culture, create space for dialogue and critical reflection, and create caring structures for students. Transformative structural leaders developed inclusive practices and also helped their colleagues to move towards inclusive pedagogical orientations. Transformative learning leaders focused on instructional leadership providing scaffolding and focusing on praxis. Finally, transformative political leaders helped others learn to negotiate power between various stakeholders and challenge oppression. These two social justice leadership frameworks overlap with others explored in the literature review, yet provide the closest alignment with my findings.

Frameworks for leadership development. Frameworks for leadership development which were solidly reflected in the findings mirror the assumptions of leadership development work and the learning processes which are recommended in the literature.

Assumptions of leadership development work. There are a number of assumptions about leadership work which are prevalent in the literature and are also evident throughout the study. The first assumption was that from the outset I recognized that the leadership development program I would implement through the leadership development sessions would be only one small part of participants' development as leaders (Anderson & Saavedra, 1995; Byrne-Jimenez & Orr, 2007). Participants in the cohort also belonged to other communities in which they developed their leadership skills. These included work with MSIP, UNESCO, MTS, Special Area Groups of Educators (SAGE), as ESJ Chairs for their local teacher associations, participating in divisional leadership development programs, and literacy coach training. Learning

opportunities outside the school system included participating as board members and having leadership positions with community organizations. This membership in multiple leadership communities strengthened our dialogue and deepened developing understandings of leadership.

Assumption two was that the leadership development would be a personal growth experience (Brown, 2004; Byrne-Jimenez & Orr, 2007; Curry, 2000; Riley, 2009; Theoharis, 2007). This idea was supported in the study findings by all participants through their final feedback and throughout the sessions during sharing circles.

Assumption three was that leadership development would assist individuals to develop a leadership identity (Curry, 2000). All participants indicated that participating in the cohort had helped them to identify in general as a leader, and specifically as a teacher leader and change agent. Assumption four was that leadership development should help people develop emotional resilience (Riley, 2009). Participants demonstrated this throughout the study as one of the key outcomes was that participants identified an increased sense of wellness and ability to sustain their engagement in social justice leadership.

Assumption five was that individuals should be given opportunity to develop understanding of the moral imperative of educational leadership (McClellan, 2010). Participants indicated that involvement in the leadership development cohort strengthened their will and personal commitment to the importance of leadership. For one participant in particular this will to lead represented a significant shift in perspective. Assumption six was that leadership development should increase levels of awareness, acknowledgement and action (Brown, 2004). Participants reported significant growth in

personal knowledge when they completed the SJTLSA for the second time, their action research provided evidence of growth in understanding of the issues, acknowledgement of challenges and confirmed their actions. Assumption seven was that aspiring leaders would need time to develop their social justice praxis (McClellan, 2010). Action research provided time and space to develop praxis, as did multiple other opportunities during leadership development sessions to learn theory, explore frameworks and discuss how they could be applied to practice. Participants noted the significant contribution of sustained engagement to their learning. Assumption eight is that leadership development programs should develop networks of support, prioritize dialogue, and encourage proactive thinking by examining exemplars of stellar leadership (Byrne-Jimenez & Orr, 2007; Campbell-Stevens, 2009; Theoharis, 2007). This cohort based study focused on developing a network for ongoing support, was very dialogic in nature and incorporated numerous examples of stellar leadership through readings, frameworks and shared facilitation. Participants expressed appreciation for these elements of the program repeatedly in their feedback, thus providing further support for this assumption.

Learning processes for leadership development work. There were three learning process frameworks which were robustly reflected in the study. The five step process for constructivist learning articulated by Lambert et al. (2002) focuses on purposing, doing, constructing, reframing and transforming. While this frame was not a conscious part of my planning, it does capture the essence of our learning process that occurred. We reflected upon, questioned and challenged current ways of thinking; clarified, changed and or strengthened values, beliefs and patterns of thinking; and aligned leadership with

new ways of thinking. This was observable through the action research cycles, learning-focused conversations and the processes used to facilitate critical reflection.

A second set of learning processes manifested in the leadership development sessions included action learning, capacity building, appreciative inquiry and multiple chances to learn (Andrews & Lewis, 2004). Learning through practical experience was the key premise underlying the use of action research. We talked about capacity building as a central tenet of the leadership development model and their teacher leadership work and spent considerable time exploring the concept of shared leadership capacity. Appreciative inquiry was the positive approach we adopted to focus our dialogue whenever a member of the cohort facilitated, we approached a new reading or met with a guest speaker. We tried hard to stay away from negative thinking and focused on what positive lessons could be learned from our experiences. Finally, multiple chances to learn underscored the multiple cycles of action research, the opportunity to role play fierce conversations and multiple strategies for critical reflection.

The third learning process solidly captured during leadership development sessions and evidenced in this particular section of the chapter is the practice of learning from the frameworks that others use in their leadership (Begley, 1995). Multiple frameworks were shared during cohort sessions. Participants indicated that these frameworks were very significant supports to their leadership. They provide research-based approaches to planning, identify “tried and true” strategies, and help people to conceptualize issues and a plan of action. Frameworks are located at the centre of the graphic for the knowledge, skills and dispositions of teacher leaders for social justice in Chapter Seven, to indicate the importance and practical application of frameworks to

their leadership work. One of the benefits of frameworks is their flexibility. Frameworks introduced for one purpose in the leadership development sessions were intelligently adapted for other purposes by participants.

Frameworks for teacher leadership. The frameworks that I used to describe teacher leadership originally were largely confirmed through the study. A few interesting nuances were identified however. One of the key constructs of teacher leadership discussed by scholars such as Katzenmeyer and Moller (2009) is teacher leaders' strong lateral relationships with peers. While participants confirmed that these relationships are valuable, they also talked about the challenges of maintaining these relationships while doing social justice work. The initiatives and positions of teacher leaders for social justice seem to bring them into conflict with their peers. This problem is not surprising given that social justice work is not neutral, involving siding with the least privileged in society (Brown, 2004) and working for just, empathic, democratic and optimistic communities (Kincheloe & Steinberg, 1995). Raising issues about long-standing school practice, advocating for students to be treated equitably or promoting inclusive practices may upset or annoy colleagues. At times cohort members' colleagues were hostile towards them and appear to be threatened by their leadership work. While we worked on developing skills for facilitating difficult conversations and effective groups that can handle challenging topics, handling conflict with colleagues requires further investigation and skill development for teacher leaders who initiate social justice work in schools.

Interestingly, Katsarou, Picower and Stovall (2010) wrote about the importance of establishing a third space for social justice dialogue between cooperating teachers, teacher candidates and faculty supervisors in their pre-service education program. The

cohort provided that third space for participants in this study. Perhaps there is potential in considering creating such third spaces in schools for open dialogue about social justice issues. According to Mayo (2013), Gay Straight Alliances are serving this purpose in some high schools, for both staff and students.

In contrast to Katsarou and others' (2010) recommendation to develop sympathy and solidarity, I found the teacher leadership cohort was much more focused on developing empathy. We spent a fair bit of time talking about how empathy develops and whether children need to have experienced empathy to be able to demonstrate it towards others. This topic was relevant as many of the students that participants advocate for may have not had opportunities to develop empathy as children. The teacher leaders in the study felt this development of empathy was central to developing commitments to social justice, among students in particular. It would be interesting to conduct further research that explores whether empathy is more important than sympathy in developing commitment to social justice, not only among students but teachers as well.

A third significant aspect of teacher leaders' potential as change agents was based on their strong leader member exchange (LMX) or relationships with their supervisor (Yukl, 2010). This leadership term suggests that the higher the LMX the more affiliation an individual feels towards their place of employment and the more loyalty to the organization. This concept presents differently in schools. Members of the study cohort talked about their relationship with administrators as very significant. Positive relationships furthered their work, while less positive relationships erected barriers. What seemed to be more significant for these teacher leaders than what the literature suggests was the level of transience in those relationships. Most participants in the study had

worked in different schools, some in different divisions, but all had worked for different administrators. They were acutely aware of the impact of their administrators on their leadership work. In some cases members practiced upward influence by feeding material to their administrators from the leadership development sessions or suggesting topics for discussion found in the STJLSA. They saw themselves as educating their administrators about social justice content and process. Sometimes this teaching occurred because their administrators were open to learning about social justice leadership, while in other situations participants fed material upward in the hopes that their supervisors could benefit from developing some new insights. Participants also reflected on times during their careers when they had felt support for their activist work from their administrators and when they felt an absence of support. So the existence and development of LMX for teachers is a more complex and episodic affair than I understand it to be in business environments. As in so many other aspects of social justice teacher leadership, LMX is highly influenced by the changing conditions in which teachers work and is not static.

Another interesting distinction that surfaced was that while scholars focus on deficit thinking as a limitation for working with students, one participant picked up on her own deficit thinking about her colleagues while completing the SJTLSA a second time. This critical incident indicates that a specific focus on our interactions with colleagues around social justice is warranted. Asset orientations towards students are not necessarily applied automatically to colleagues. This shift also underlines the potential of individual items in the self-assessment tool to stimulate further thinking and reflection. It also supports the importance of self-assessment for developing teacher leadership.

Scholarly Contributions

This study focused on first identifying the knowledge, skills and attributes of teacher leaders for social justice and then developing a leadership development model with potential for enhancing and strengthening those skills. Both of these endeavours represent original work. The first focus is captured in the Venn Diagram developed in Chapter Seven (Figure 34, p. 271) and again as one part of the leadership development model (Figure 47, p. 399) in Chapter Ten. To facilitate self-assessment and reflection during the leadership development program I developed the SJTLSA and SJTLPR for use in the leadership development sessions. These tools also are original contributions inspired by the work of previous scholars. Both tools were created, validated and pilot tested in Manitoba with input from groups of teacher leaders, school leaders and social justice activists.

I believe the leadership development model refined through this study and articulated in Figure 47 synthesizes my research process in a way which can inform scholars, practitioners and activists. Finally, the iris model generated in Chapter Twelve (Figure 49) presents a theoretical construct for not only teacher leadership development, but also for the development of agency by teacher leaders for social justice. This research study therefore makes the following unique contributions to scholarship:

1. Social Justice Teacher Leader Self-Assessment (SJTLSA)
2. Social Justice Teacher Leader Peer Reflection (SJTLPR)
3. Action research methodology for monitoring and guiding multiple cycles of inquiry (Figure 21)
4. Figure 34 proposes a theory-in-context of knowledge, skills, dispositions and agency for teacher leaders for social justice.

5. Phases One, Two and Three Graphics and the Combined Leadership Development Model (Figures 42 to 47)
6. Iris Leadership Development Framework (Figure 49)

Implications

This research study has implications for five different fields that are readily identifiable. Teacher leaders, facilitators of adult learning, theory, research and scholarship can all be influenced by the results of this study.

Implications for teacher leaders. Findings generated from this study provide considerable understandings about what motivates, challenges and sustains teacher leaders active in social justice work. A critical recommendation to make to the field is that individuals engaged in this work are desperately in need of ongoing networks for support. The work is difficult and can be draining, particularly if the context in which teacher leaders for social justice are working is less than supportive. It is essential that teacher leaders have a community to which they can belong that will support them emotionally, practically, ideologically and politically in this important work.

This community and individual teacher leaders should engage in critical reflective practice to help identify the best areas to focus on, the most effective ways in which to work, assess the impact of their actions, troubleshoot when things go awry and most importantly celebrate growth, change and impact. The nature of the community is that it should be both supportive and challenging. To find a group in which one could have their thinking challenged by others with similar convictions and related experience was very important to study participants. Often teachers are somewhat isolated when providing

leadership in their school context, and therefore the opportunity to be a learner during the leadership development sessions was appreciated by all.

It was also very important to participants that they learned how to facilitate learning-focused conversations. Developing this professional skill allowed them to support the growth of others (Preskill & Brookfield, 2009) through engaging them in reflective conversations. It also proved to be a powerful tool when engaging in reflective dialogue with teacher candidates and students. They found paraphrasing in particular to be a very effective tool in assisting others to reflect upon and resolve their own challenges.

Members of the study cohort were very excited by the potential of action research to strengthen their practice as teacher leaders. They found the process practical and that the templates and instruction provided supported their use of action research in their own context. The action research cycle template helped them articulate a clear focus and track their strategies, collect and analyze data, and to redirect their efforts based on findings. For that reason I recommend that teacher leaders learn about action research and seek out opportunities to engage in action research within a community of peers.

Teacher leaders were empowered by their participation within a cohort. It supported them in becoming greater risk-takers and to see themselves as change agents. To sustain themselves in this work, it is essential that teacher leaders for social justice have networks for support and challenge in which to develop their visions of a socially just world, develop knowledge and skills and enhance their personal wellness.

Implications for facilitators of adult learning. The chance to facilitate the Teacher Leadership for Social Justice Cohort was a wonderful opportunity for me to not

only conduct research, but also hone my facilitation skills. The implications for other facilitators are categorized by the headings strategic design, responsive facilitation and fostering leadership development.

Strategic design. Strategic design signifies that all aspects of the leadership development program must be carefully thought out to maximize their impact. Even small decisions such as caterers and wind-up gifts were opportunities to integrate the purpose and intent of the cohort.

Clear design frame. Strategic design begins with articulating a clear design frame (Lipton & Wellman, 2011b) for the learning experience. Creating the design frame forces one to think through the structure, intent and organization of the experience and communicate it with group members. It also serves as a kind of contract with group members and a touchstone which can be revisited regularly to refocus when a group goes astray. I found the design frame to be of critical importance to the cohort's success and very effective in clarifying my intent.

Careful selection of strategies. Strategic design also includes selecting specific strategies and techniques in a mindful way. Making those selections requires knowledge of the content to be explored, the skills to be acquired, but also the characteristics of the group you are working with. It is important to set outcomes for the task, the relationships and the group (Lipton & Wellman, 2011b).

Transparent design. I found it very helpful when facilitating the leadership development program to be explicit about how and why I was making decisions about my facilitation of the group. Sharing my thinking and process provided a model for their own leadership and facilitation processes and clarified my own thinking. Processes such as the

logic model and researcher's action research cycles were very supportive in this practice. Including an opportunity to reflect on individual, group and facilitator strengths and stretches kept everyone focused on maximizing our experience and making strong individual contributions. When we learned about the characteristics of effective groups (Lipton & Wellman, 2011b) participants had personal experience with the processes involved and were able to integrate the theory easily.

Responsive facilitation. The other very important finding in facilitating this cohort was to be responsive to the group. I utilized a number of approaches to increase the responsive nature of my facilitation.

Participant feedback. I collected detailed participation feedback at the end of each session, analyzed this feedback into themes and identified recommendations based on that feedback. Subsequently I integrated those findings into the next action research cycle and session agenda. The participant feedback allowed me to determine which strategies were effectively supporting learning, which topics were resonating with participants and which directions the group would like to pursue. Beginning with Session Three when I included reflection on the individual, the group and the facilitator, I was also able to use this feedback to address potential issues arising within the group and gain insight into individual experiences. Participant feedback on my facilitation helped me reflect on my own practice and increase my effectiveness. Fundamental to the effectiveness of the participant feedback process was my accountability to the group. By sharing the logic model, action research cycle and emerging themes in each session, I was accountable to the group about how I interpreted the feedback and the decisions I took based on the findings.

Facilitating sessions responsively. A further aspect of responsive facilitation was touching base with the group throughout each session. As the energy of the group would rise and fall I would check in with them to see if they would like to adjust the order of activities. I also needed to be a careful observer of their energy levels so as to make “in flight” changes to our timeline. Activity breaks were every effective in raising the energy level of the group and interrupting what at times could become very serious content. As the sessions progressed the number of activities decreased and the length of activities and satisfaction with the facilitation increased. My recommendation for other facilitators therefore is to carefully monitor the energy level, intensity and activity level of the group, not be afraid to adjust when necessary and to include the group in making those decisions. I learned to be open to having group members influence the pace of the group by using their own leadership skills.

Facilitation guides. Creating facilitation guides supported me in being flexible. The guides captured my thinking in advance of a busy session and allowed me to flexibly manoeuvre around the agenda, without losing sight of the purpose and structure of individual activities.

Logic models. Creating the logic models forced me to create a specific record of how long each specific learning experience lasted. Collecting this data can support facilitators to use the same strategy effectively with subsequent groups. Creating logic models also trained me to always articulate a clear purpose for each learning experience and to share that purpose with participants, another example of transparency.

Emergent design. Being responsive to the needs of the group meant that I did not pre-determine the content or structure of cohort sessions before we began to meet. The

content, structure and processes I used to facilitate the group evolved over time based on the above mentioned feedback process. This emergent character was very important to participants and influenced participants' decision-making during the recruitment process.

Predictable routine. At the same time as I tried not to pre-determine too many aspects of the sessions, I also found it was important to provide a constant structure to each day in terms of location, visuals, timing, breaks, meals and routines which could contribute to feelings of safety and predictability. While cohort members could not anticipate when they would have time to write in their journals, they knew there would be time allocated for this as well as other key activities in each session. Over time, based on my observations and participant feedback after experimentation, we settled into predictable routines such as writing early in the day followed by partner dialogue and ending each day with a sharing circle. The combination of emergent content, responsive facilitation and strategic and predictable design maximized safety, input, impact and effective use of time. For these reasons I recommend these practices to other facilitators of adult learning groups.

Fostering leadership development. Facilitators of groups focused on leadership development must share the responsibility for leadership with group members. It is very important that individuals have opportunities to contribute to the community. Contributions may involve facilitating a learning experience, making a presentation or introducing new content to the group. Contributing in a tangible way to the group increases feelings of belonging and commitment to the group. There must also be choice in this process however so that it does not feel like roles are being assigned by the facilitator. In effective groups individuals step forward to assume leadership roles

because they feel safe and want to contribute. Thus shared leadership increases over time as decision-making and the role of expert spreads from the facilitator to all members of the group. This observation was very apparent as I worked with the cohort.

The development of teacher leaders is neither a simple nor a predictable process. The strategies and approaches outlined in this dissertation contributed to participants' ongoing development of teacher leadership skills and dispositions. The resulting leadership development model and accompanying strategies are offered to the field as strategies with potential to contribute to growth in the ability of teacher leaders to respond to issues of inequity and injustice in schools. While the focus of this dissertation has been to develop a leadership development model, I am cognizant that there were many contributing factors to participants' growth beyond their experience with this cohort. Specific influences beyond the cohort credited throughout the dissertation include graduate coursework, membership on committees, positions of leadership within various educational bodies, mentoring and participation in other leadership development programs.

Developing as a teacher leader is a gradual and lifelong process. The leadership development program that participants experienced through this research study contributed to their personal and professional growth. Yet participation does not guarantee growth any more than taking a course guarantees learning. Ultimately the journey of a teacher leader is a personal one. Learning often occurs through critical incidents or moments of insight and as a result of focused reflection on personal and shared experience. Yet the work of a teacher leader pursuing social justice is never simple and never finished. As identified by Kumashiro (2000), the role of a teacher

engaged in social justice work is to be always critical, always reflective and constantly seek out what is missing, who is not included and whose voices are not being heard. This challenge is tough and ongoing. Although the cohort and our shared learning through the leadership development sessions supported this process, the challenges remain.

Implications for theory. This study has three different implications for theory based on the teacher leadership for social justice framework, the leadership development model and the theory of action expressed through the iris metaphor.

Teacher leadership for social justice framework. Through this study I developed and tested a framework for teacher leadership for social justice. This process occurred through the development of the SJTLSA and SJTLPR and was strengthened through studying the strategies adopted by practicing teacher leaders. This theory-in-context articulates the knowledge, skills, dispositions, strategies, beliefs, relationships and frameworks which support teacher leaders in operating as change agents in schools. Furthermore, it is embedded into the leadership content strand of the leadership development model and the design, structure and content of the self-assessment and peer reflection tools.

Leadership development model. A second theoretical contribution is the design of the leadership development model. The way in which this leadership development model has been designed integrates findings from previous research and findings resulting from implementing the model with the Teacher Leadership for Social Justice Cohort. The model represents a theory of action for how to develop critical agents of change. Previous models have focused on teacher leadership development without a social justice focus (Katzenmeyer & Moller, 2009; Crowther et al., 2009), teacher candidate development for

social justice without a leadership focus (Katsarou, Picower & Stovall, 2010), or social justice leader development as administrators without teacher leader positionality (Bell McKenzie et al., 2008; Darling-Hammond et al., 2010).

This model breaks new ground by articulating a leadership development process for teacher leaders for social justice that is grounded in real experience. It will require further testing in different contexts and will be revised and refined over time. It is not intended to be a definitive leadership development model but rather a contribution to the field. The modular structure of the model facilitates improvisation. Practitioners are free to adapt and modify the model to suit their purposes. The learning strategies and principles of community however in the central section (shown in pink and blue) were critical to its effectiveness as a model for leadership development. I recommend these practices be adopted in leadership development models when appropriate.

Iris theory of action. The iris model presented in Chapter Eleven offers a theoretical construct for how and why the leadership development model was successful and how the phenomenon of social justice teacher leadership can contribute to change in schools. The rhizomatic nature of the iris plant captures the way in which learning, growth and social justice activism stimulates change in systems. A significant feature of the iris metaphor and its relevance to social justice work is that the majority of the “work” is not visible at the surface. The kinds of change initiatives study participants pursued through their action research have long term growth and change in mind. They were aiming to influence beliefs, commitments and ultimately actions of their colleagues. The rhizomatic nature of the iris also captures the way in which this study holds potential to influence change by sending out new roots, developing new rhizomes and stimulating

further growth. The natural image of the iris represents the organic nature of social justice work which is both situated in and responsive to its context.

Implications for research. Implications of this research for other researchers include further exploration of researcher positionality, data management, multiple forms and functions of researcher reflections, the action research inquiry cycle methodology and use of a process-folio to present action research.

Researcher positionality. In this study I functioned as a member of a collaborative inquiry group, the facilitator of a teacher study group, an insider with other teachers and social justice activists and an outsider as a researcher and facilitator studying the experiences of participants in the cohort with their cooperation and involvement. This particular action research study seems to span four of Herr and Anderson's (2005) categories of positionality for action researcher.

Insider research. As a researcher studying my own practice, the study is an example of insider research. I used action research cycles designed to study my facilitation of the cohort sessions.

Insider in collaboration with other insiders. The study is also an example of the "insider in collaboration with other insiders" position in that we as a group are all committed to social justice leadership. We are committed to doing that work in schools where those perspectives are not the norm or majority perspective. In that sense we are inside of a concept or perspective that is not shared by outsiders.

Insider(s) in collaboration with outsider(s). In addition, my positionality is an illustration of "insider(s) in collaboration with outsider(s)" and functions like a study group. This characterization is appropriate because the group identifies topics it wished to

investigate and I as the outsider facilitated that learning by preparing processes and materials to access that knowledge.

Reciprocal collaboration. The fourth description which aligns with parts of the study is reciprocal collaboration. There was a deliberate attempt to distribute power within the group, the feedback and sharing processes were reciprocal with the group and there was a high degree of collaboration amongst group members and myself in articulating the findings from the study.

A new question of insider outsider reciprocal collaboration. This study raises a new question of whether there is a need for a new category of researcher positionality or perhaps the possibility of constructing hybrids. In my positionality in this study there are elements of four different categories, so I consider my positionality to be complex, multi-layered and flexible. Perhaps this is the complexity theory equivalent of positionality in which the researcher's position is understood to be complex and organic. This study then would have a contribution to make to the categorization of researcher positionality in action research studies. The hybrid positionality I have now identified for this study is "insider outsider reciprocal collaboration".

Data management. Meticulous organizational systems are critical for protracted studies with multiple data sources. It was effective to create a digital database into which I entered every piece of data by title, format, location, and date of creation. Each document also included a footer which identified the document's working title, its folder location and date. These systems helped me keep track of various renditions of files and steps in the research process. For maximum efficiency files should be entered onto the database as soon as they are created, notes should be entered whenever a file is moved to

a new location or folders are reorganized and the database footer should contain the date of the last entry.

Multiple functions and forms of researcher reflections. The act of writing and dictating various forms of researcher reflections while conducting this study was a very productive aspect of the research. I wrote and reflected to organize, plan, explore ideas, make sense of data, and identify and resolve issues that arose at all stages in the research process. Writing researcher reflections came to be the way in which I found my path forward when I wasn't sure what to do next and the way I sifted through the reams of data and experiences which comprised different aspects of the study. The act of writing allowed me to conduct conversations with myself in which I could play devil's advocate, question my actions, capture my doubts and most importantly inform my analysis. The ten-step methodology I used to study my own practice, in particular the session summaries and cumulative themes, required me to write frequently as I moved through the steps. This writing informed and deepened my understanding of the data and the research experience.

Action research inquiry cycle methodology. The process I used to develop, enact and reflect on my action research inquiry cycles was very effective in discovering significant findings and directing future cycles. This may be helpful for other action researchers, particularly those interested in implementing action research when facilitating groups. I did not encounter such a process in my review of the literature but it is possible that others have used similar processes without including them in their final publications.

A process-folio approach to documenting action research. Presenting the specific steps followed in the researcher's action inquiry through a process-folio may also be useful for other action researchers. Therefore, this study makes a contribution to identifying and describing effective processes for managing multiple sources of data in an action research study with multiple cycles of inquiry.

Implications for scholarship. This study contributes to the growing body of literature which explores social justice leadership. As the scholarly record increases in a given area the findings splinter into ever increasingly specific sub-areas. I created this study to address what I perceived to be the gaps in the literature. The gaps identified indicated the need to know more about a) how participating in an ongoing network could support social justice teacher leaders, b) how leaders develop critical consciousness, c) how awareness of leadership theory would influence teacher leader practice, d) which facilitation skills teacher leaders would find most effective in facilitating dialogue with their peers, and e) what contributes to agency of teacher leaders. This study addressed and responded to these gaps in the literature in the following ways.

Impact of participating in a network of social justice teacher leaders. Teacher leaders increased their sustainable engagement to social justice work through participation in the leadership development sessions. They developed strong relationships with other teacher leaders who share their ideology. They increased their physical wellness and strengthened their will to engage in this work. They became passionate advocates of the cohort experience expressing a wish that others have similar opportunities. Finally they became more willing to engage in the work and experienced joy through the process.

How leaders develop critical consciousness. The transformative experiences participants had through involvement in the cohort helped them acquire critical insights. The processes of conducting and participating in action research and learning-focused conversations empowered participants. Learning facilitation skills and having opportunities to practice increased their comfort with risk-taking and strengthened their identity as change agents. This area was not as successful as originally envisioned; further work needs to be done in the area of exploring effective processes for deepening critical consciousness in professional learning contexts. Developing critical consciousness also requires simply a longer time period of engagement and exposure to different critical theory frameworks.

Impact of learning leadership theory on teacher leader practices. Participants indicated that the opportunity to learn about leadership, equity and agency frameworks gave them the tools for action they required. Exposure to leadership literature strengthened their role identity as teacher leaders and change agents.

Facilitation skills teacher leaders found most helpful with peers. Through their action research reports and in discussion during the leadership development sessions, participants indicated that they were able to influence their colleagues through advocacy, providing support, modeling and inspiring, mentoring and providing training. They also found it effective to support a school-wide focus as a means to influence their colleagues. They found it was critical to build strong relationships, acknowledge and empower others. Processes they found effective in this work included recognizing and building upon success, targeting individuals, identifying a clear focus and goals, expanding their sphere of influence, modeling inclusive practices, disseminating supportive materials,

gathering data that can be used to focus reflection and goal setting. One of their most effective strategies was to engage others in dialogue.

What contributes to agency of teacher leaders? Factors that contribute to teacher leaders' development of agency have been explained in detail throughout this dissertation. Noteworthy factors are: participation in a network of like-minded peers, access to frequent opportunities for critical reflection and dialogue, conducting action research, experiencing and facilitating learning-focused conversations, learning about frameworks for leadership, equity and agency, sufficient time in a safe space to explore new ideas and reflect, and finally facilitated learning processes.

From the outset of this study, I anticipated that participants would require more time than the leadership development sessions could provide to develop confidence and competence with specific facilitation skills and indeed this occurred. A request for additional time, beyond the one extra day I was able to include, has been addressed by participants themselves. They applied for and received a grant, to provide release time to support the group in continuing to meet. This grant will allow the group to consolidate their skills and continue their engagement in processes that were central during cohort sessions such as critical reflection, learning-focused conversations and action research. The continuation of the cohort as a network of like-minded peers is strong evidence of the catalytic validity (Lather, 1991) of this study. Each of the five gaps in the literature were addressed at least in part by this small study. New gaps in the literature identified as a result of this study are described in the following section.

Recommendations for Further Research

Multiple areas for further research were identified during the research process. The sub-sections that follow address these areas in more detail.

Identify who participates in social justice leadership. One area for further investigation concerns identifying those individuals who voluntarily participate in social justice work. The first focus would be to explore more fully the link between gender and social justice work as study participants and their colleagues engaged in social justice were predominantly female. It is important to explore whether this gender imbalance is replicated with a larger sample and if so to determine the contributing factors and how they can be addressed to ensure more balanced gender participation in social justice teacher leadership. A second and possibly related area for investigation would be to determine approaches which are effective in helping teachers develop empathy as opposed to sympathy. Study participants believed empathy was an important prerequisite to their involvement in social justice work, and were curious about how empathy develops and whether it influences individual commitments to social justice.

Determine how to develop critical consciousness in teachers. Another area in need of further exploration is strategies which are effective in developing the critical consciousness of teacher leaders involved in professional learning communities. This research makes a small contribution in this area by identifying elements of the leadership development model through which I tried to develop critical consciousness during cohort sessions. Further investigation is warranted as critical consciousness takes time to develop, receives little attention in professional development of practicing teachers and strongly supports teacher leaders' agency.

Determine the impact of teachers developing strength-based and social justice perspectives. A pillar of social justice work is adopting a strength-based perspective. The SJTLSA stimulated one participant to recognize she had been operating from a deficit orientation towards her colleagues. Similarly, participants indicated that completing the SJTLSA introduced them to new aspects of social justice. It is important therefore to investigate further the impact of engaging colleagues in conversations about strength-based perspectives and social justice, to gain more understanding about the significance and potential impact of both processes on the perspectives of participating teachers.

Investigate the potential utility of SJTLSA and SJTLPR. The SJTLSA and SJTLPR need to be used with different constituent groups and for different purposes to determine their ability to provoke self-awareness, critical reflection and dialogue in varying contexts. Related research would investigate the ways in which the tools could be effectively streamlined or adapted for particular purposes such as for use with pre-service teachers or social justice leadership endeavours outside of the formal school system.

Determine the efficacy of teaching conflict resolution strategies to teacher leaders. Findings from the study indicate that teacher leaders feel they need to learn ways to handle conflict when working with peers. The focus during the leadership development sessions on fierce conversations was a contribution to this challenge. It is important to learn how the efficacy and agency of teacher leaders could be strengthened by learning about conflict management and developing conflict resolution skills.

Determine the long term impacts on study participants. It is important to assess the long term impact of the study on participants and their school contexts. This

would require follow-up contact with participants to learn more about how they have made use of the skills and experience gained through participation in the cohort. Findings from such a study could contribute to strengthening the leadership development model and its implementation with subsequent cohorts. A low level of follow through for example might indicate a need for a further phase in the model to support application of skills beyond the leadership development sessions. A high level of follow through in one or more specific areas would indicate support for specific aspects of the model enacted in this study.

Evaluate and revise the leadership development model for different contexts.

Further testing is also required to assess the ways in which the leadership development model can be used to guide other leadership development programs. It is important that the leadership development model be tested with other cohorts with the same focus, as well as with leadership development programs focused on different skill sets, to determine its efficacy and adaptability to different contexts. The modular structure of the leadership development model is intended to support its adaptation for multiple purposes; however the specific ways people choose to use the model to support further leadership development still need to be identified.

Explore the impact of differentiation for participants' developmental levels on subsequent leadership development session participants. Finally, Drago-Severson (2009) builds on Kegan's (2000) constructive-developmental theory to identify four pillars which support adult learning. Teaming, leadership opportunities, collegial inquiry and mentoring are Drago-Severson's four pillars, all four of which are strongly reflected in this research. Drago-Severson and Kegan maintain that adult learners grow the most

when facilitators of adult learning understand their developmental levels and vary their responses accordingly. Further research should therefore explore differentiation for participants' developmental levels of growth within critical leadership development sessions. This would involve the incorporation of Kegan's (2000) constructive-developmental theory into subsequent leadership development cohorts and the model of leadership development described in this dissertation.

Summary of Chapter Twelve

At the outset of this chapter I reviewed the structure and contents of the previous chapters of this dissertation organizing it into four sections: foundations, enactment, findings, interpretation and implications. Second, I presented the conclusions drawn from this study and compared those findings with the existing literature. I revisited the five types of frameworks that proved to be important to the conduct of and findings generated by this study. These are frameworks for networks of support, social justice, social justice leadership, leadership development and teacher leadership. Third, I identified the scholarly contributions of this study including the SJTLSA, SJTLPR, Iris Leadership Development Model, and theoretical construct of teacher leadership for social justice. Fourth, I identified possible implications of the study for teacher leaders, facilitators of adult learning, theory, research and scholarship. Finally, I presented recommendations for future research which will build upon what was learned through this research study. I articulate my final observations and comments in the conclusion.

Conclusion

I initiated this study because I felt compelled to influence the educational success of students in marginalized populations. I chose to do so by focusing on the educators

who teach in Manitoba schools, as research indicates that teacher attitudes and beliefs can be barriers to student success. My personal and professional experience has revolved around the three central themes of education, leadership and social justice. Literature explored in these three areas quickly led me to focus on the phenomenon of teacher leadership as a potential change strategy. With ideological commitments to social justice and powerful positions as teacher leaders, I envisioned the participants in this cohort as catalysts for change. Situated as they are within social and professional circles, they are close to the action and well positioned to influence their colleagues. Action research was identified as the methodology most appropriate for capturing the experiences and perceptions of participants. Multiple action research cycles and careful data collection and analysis facilitated the identification of and response to developing themes using emergent design, a process Herr and Anderson refer to as “designing the plane while flying it” (2005, p. 69).

The cohort based leadership development model developed over the course of this study brought together a small group of committed like-minded individuals to engage in facilitated and sustained dialogue about social justice leadership. The specific elements of the model which contributed to their growth in skill and understanding (Figure 39, p. 342), and the specific contributions of participating in a co-constructed community (Figure 41, p. 368), were selected from the work of previous scholars and strengthened and refined through participant feedback, observation and analysis. Two of these processes, self-assessment and peer feedback were supported by the development and use of the SJTLSA (Figure 19, pp. 181-190) and SJTLPR tools. The resulting framework of the knowledge, skills, dispositions and agency of teacher leaders for social justice (Figure

34, p. 271) grew from the content of these tools as well as the experiences of participants in this cohort. As a result of their involvement in the cohort, participating teacher leaders identified a number of transformative experiences, identified specific frameworks for action and indicated they had the tools for sustainable engagement. The resulting leadership development model (Figure 47, p. 399) synthesizes the experiences of this particular cohort and suggests research-based approaches suitable for adoption by others. The modular figure allows for flexibility in application and transferability to diverse contexts.

The strength, effectiveness and sustainability of teacher leaders for social justice were enhanced through belonging to an ongoing community of like-minded peers. Membership in the cohort community developed the will, the commitment and the relationships which will sustain the individual leaders over time. The experiences participants had through their involvement in the cohort allowed them to experience as learners, processes which they will facilitate effectively as leaders, particularly risk-taking, action research and learning-focused conversations. This experiential knowledge led to personal commitment to and belief in the strategies. Finally, the frameworks for action around equity, leadership and agency help frame the concepts and provide tools and direction for action. These three research outcomes, transformative experiences, frameworks for action and sustainable engagement, constitute the agency of teacher leaders for social justice. The three features of community, reflection and action, built agency and further developed these teacher leaders for social justice. The ability of teacher leaders to influence colleagues through facilitating dialogue around critical issues has already begun and will continue in the future as a result of their shared network of

support. I am confident that their shared leadership capacity will help Manitoba teachers develop critical insights and strengthen educators' abilities to respond effectively to the needs of our most vulnerable students by adopting asset attitudes and engaging in critical, reflective and collegial practice.

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Appendix A

Human Ethics Approval Certificate by Education/Nursing Research Ethics Board



UNIVERSITY
OF MANITOBA

Office of the Vice-President
(Research and International)
Research Ethics and Compliance

Human Ethics
208 - 194 Dafee Road
Winnipeg, MB
Canada R3T 2N2
Fax 204-269-7173

APPROVAL CERTIFICATE

March 22, 2012

TO: Cathryn Smith (Advisors B. Lewthwaite/F. Morin)
Principal Investigator

FROM: Stan Straw, Chair
Education/Nursing

Re: Protocol #E2012:014
"Developing Teacher Leaders for Social Justice: Building Agency through
Community, Critical Reflections and Action"

Please be advised that your above-referenced protocol has received human ethics approval by the Education/Nursing Research Ethics Board, which is organized and operates according to the Tri-Council Policy Statement (2). This approval is valid for one year only.

Any significant changes of the protocol and/or informed consent form should be reported to the Human Ethics Secretariat in advance of implementation of such changes.

Please note:

- If you have funds pending human ethics approval, the auditor requires that you submit a copy of this Approval Certificate to the Office of Research Services, fax 281-0325 - please include the name of the funding agency and your UM Project number. This must be faxed before your account can be accessed.
- if you have received multi-year funding for this research, responsibility lies with you to apply for and obtain Renewal Approval at the expiry of the initial one-year approval; otherwise the account will be locked.

The Research Quality Management Office may request to review research documentation from this project to demonstrate compliance with this approved protocol and the University of Manitoba *Ethics of Research Involving Humans*.

The Research Ethics Board requests a final report for your study (available at: http://umanitoba.ca/research/orec/ethics/human_ethics_REB_forms_guidelines.html) in order to be in compliance with Tri-Council Guidelines.

Appendix B

Letter of Consent for Superintendents



UNIVERSITY
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March 22, 2012

Dear Superintendent (or Director of Research),

My name is Cathryn Smith and I am a doctoral candidate at the University of Manitoba. I am carrying out a research study on teacher leadership for social justice under the supervision of Dr. Brian Lewthwaite and Dr. Francine Morin of the University of Manitoba, Faculty of Education. The purpose of this study is to influence change in Manitoba schools by determining, through participatory action research, a leadership development model with potential to develop teacher leaders for social justice. I am writing to request permission to approach teachers who are employed in _____ School Division regarding their possible participation in this study.

Should you grant permission for teacher leaders from the division to participate in the study, and should an individual employee of the division be accepted into the cohort, specific responsibilities would be implied for different people in the division.

For the Superintendent or Director of Research:

- Providing permission for the researcher to approach divisional employees including teachers and principals regarding potential participation in the study.
- Agreeing to have participants be absent from their teaching responsibilities for six full days with substitute costs covered by Manitoba Education and administered through the Manitoba Teachers' Society.
- Agree that that teachers who refuse to participate, choose to participate or choose to withdraw at a later date from the research will experience no effect whatsoever on their standing or their workplace environments as a result of their decision.

For School Principals supervising participating teachers:

- Agreeing to have participants be absent from their teaching responsibilities for six full days over the next ten months with substitute costs provided by the Manitoba Education and administered through the Manitoba Teachers' Society.
- Allowing the researcher to visit the school to observe the program participant during leadership activities and engage the participant in learning conversations in which they reflect on their practice.

- School principals may be approached by participants to complete a peer reflection three times during the year in which they share their insight into the participant's leadership dispositions and practices.
- Agree that teachers who refuse to participate, choose to participate or choose to withdraw at a later date from the research will experience no effect whatsoever on their standing or their workplace environments as a result of their decision.
- There may be an opportunity for school principals to join the cohort for an optional joint session in which participants share their experience with their principals.

For each participating teacher leader:

- Attending six full day sessions over the next ten months, with release time provided, to participate in a teacher leadership development program.
- Initiating and implementing a small action research study in the school studying their own leadership practice with other adults in the school.
- Being observed by the researcher in three to four of their usual leadership activities in the school and engaging in learning-focused reflective conversations with the researcher at the leadership site (most likely the school).
- Maintaining a personal journal, completing participant feedback sheets, participating in discussion and dialogue with the group and trying out facilitation techniques including transformative learning, appreciative inquiry and action research.
- Being videotaped during group sessions and learning-focused conversations.
- Giving permission to be directly quoted by the researcher in academic publications or presentations, with appropriate procedures followed to protect confidentiality.
- Signing a letter of informed consent indicating they understand their rights and responsibilities as participants in the study.

For other employees:

- Two colleagues of participating teacher leaders will be asked to complete a peer reflection three times during the year in which they share their insight into their participating colleague's leadership dispositions and practices. If agreeable to both parties one of the two colleagues would be the school principal or vice-principal.
- Signing a letter of informed consent indicating they understand their rights and responsibilities as participants in the study.

Given these responsibilities I would like to request permission to approach interested individuals in the division regarding their possible participation in the program. The details regarding my research design are included below for your information.

Research Project Title: Developing Teacher Leaders for Social Justice: Building Agency Through Community, Critical Reflection and Action

Principal Investigator and contact information:

Cathryn Smith

Research Supervisor and contact information:

Dr. Brian Lewthwaite (Brian.Lewthwaite@umanitoba.ca)

Research Supervisor and contact information:

Dr. Francine Morin (204-474-9054 or Francine.Morin@umanitoba.ca)

Risks and Benefits

Risks Participants in this study will be exposed to minimal physical, emotional or personal **risk**. They might experience impatience and or discomfort as a result of increasing their insight into issues of social justice and critiquing their own practice. Support will be provided by both group members and the researcher as well as information provided regarding the Employee Assistance Program of the Manitoba Teachers' Society should they wish to access further supports. They have the right to withdraw from the study at any point in which case I will not make use of their individual data unless they provide me with written permission to do so. It is important for you to know that participants have agreed that the relationships and interactions they have with the participant will not be negatively affected as a result of any of the feedback provided. There may be some negative impact on student learning as a result of teachers being absent from their classrooms for six teaching days. As experienced teachers, participants will be experienced at leaving effective learning plans for substitute teachers. Ensuring competent substitute teachers are in place and well prepared for their responsibilities with students will be facilitated by setting dates far in advance whenever possible to allow for adequate preparation and planning to take place.

Benefits There are a number of ways in which teachers may **benefit** from participating in this leadership development program. They may gain knowledge about leadership, personal insight, and an increased understanding of and commitment to social justice. They may gain experience through conducting action research about how to be more effective in their leadership roles and how to carry out action research. Participants may gain skill in facilitating adult learning using critical reflection techniques such as appreciative inquiry and transformative learning. They may deepen their commitment to social justice as a result of collaborative dialogue within a group of similarly committed individuals. They will receive emotional, practical and inspirational support from the community of practice they help co-construct and will have access to that support beyond the duration of the study. They also will have opportunity to improve their ability to reflect critically on their teaching and leadership work, a skill which is transferable to many areas of their personal and professional lives. Most significantly, as a cohort member, individuals will have the opportunity to participate in an intensely personal learning experience, focused on topics they are passionate about, alongside colleagues who share those strong personal convictions. This experience will contribute to

participants becoming increasingly effective in their role as a teacher leader for social justice.

Confidentiality

Participants' identity in this study will be kept **confidential**. I will not identify them by name or identify the school or school division in my thesis or subsequent dissemination of findings. Participants will not reference individuals by name when they report on in-school activities or contribute to group sessions. The digital data which I gather through this study once downloaded from the video camera or digital recorder, will be stored in password protected computers in my home and office to which only I have access. The written data will be stored in my home or office except when in use for the group sessions or in transport. All identifying data will be destroyed within three years of the completion of my doctoral defense, allowing me time to publish related academic articles and prepare for presentations.

Compensation

There will be no **compensation** for participants in this study though meals and refreshments will be provided. Substitute costs will be provided through research support made available to the researcher through Manitoba Education, as a result of a proposal submitted by the Manitoba Education Research Network (MERN). Funds will be administered through the Manitoba Teachers' Society.

Dissemination of Results

Results from this research will be **disseminated** through my doctoral thesis, my oral defense and academic and professional publications which may include conference presentations, book chapters, articles, on-line submission and books. Participants will be provided with a personal copy of the findings from the research. They will also have opportunity to respond to the research findings in progress and request revision should they feel misrepresented or inaccurately portrayed in the study.

Withdrawal

At any point participants may withdraw from this study by contacting the principal researcher at which time their data will be destroyed.

Once your decision has been made regarding your division's potential participation in the study, please indicate your decision on the attached permission form and return it to me via the return envelope provided. A negative response will ensure that I not approach you again regarding the possibility of your division's teacher participating in the study.

I thank you for your time and your prompt attention to this matter.

Sincerely,

Cathryn Smith
Doctoral Candidate and Principal Researcher

University of Manitoba
71 Curry Place
Winnipeg MB R3T 2N2
Email Contact
Phone

This research has been approved by the Education/Nursing Research Ethics Board. If there are any concerns or complaints about this project contact any of the above-named persons or the Human Ethics Secretariat at 474-7122, or email margaret_bowman@umanitoba.ca.

Dear Cathryn Smith,

I hereby give permission for you as the researcher to approach division teachers and principals regarding potential participation in the study “Developing Teacher Leaders for Social Justice: Building Agency Through Critical Reflection and Action.” I understand that by granting this permission I am agreeing to the following:

- The researcher will approach divisional employees including teachers and principals regarding potential participation in the study.
- Participants will be absent from their teaching responsibilities for six full days during the next year with substitute costs covered by Manitoba Education and administered through the Manitoba Teachers’ Society.
- Participants will be video and audiotaped during group sessions and individual learning-focused conversations.
- Participants may be directly quoted by the researcher in academic publications or presentations, with appropriate procedures followed to protect confidentiality.
- The researcher may approach school principals requesting to visit the school to observe the program participant during leadership activities and engage the participant in learning conversations in which they reflect on their practice.
- Teachers who refuse to participate, choose to participate or choose to withdraw at a later date from the research will experience no effect whatsoever on their standing or their workplace environments as a result of their decision.
- Participants will be required to sign informed consent letters indicating their rights and responsibilities during the study.
- I may withdraw permission for division employees to participate in the study at any time by notifying either the researcher, her advisors at the addresses provided. Participants will also have this same right.

In no way does this letter or my signature waive my legal rights nor release the researchers, sponsors, or involved institutions from their legal and professional responsibilities.

Superintendent’s Signature

Date

- I would like to receive a paper summary copy of the results of this study, forwarded to the following mailing address:
-

-OR-

- I would like to receive an electronic summary copy of the results of this study, forwarded to the following mailing address:
-

Appendix C

Letter of Informed Consent for Cohort Participants



UNIVERSITY
OF MANITOBA

Research Project Title: *Developing Teacher Leaders for Social Justice: Building Agency Through Community, Critical Reflection and Action*

Principal Investigator and contact information:
Cathryn Smith

Research Supervisor and contact information:
Dr. Brian Lewthwaite (Brian.Lewthwaite@umanitoba.ca)

Research Supervisor and contact information:
Dr. Francine Morin (204-474-9054 or Francine.Morin@umanitoba.ca)

This consent form, a copy of which will be left with you for your records and reference, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

Purpose and Focus of the Research

Inequitable educational outcomes for students from low socio-economic backgrounds, Aboriginal families, and non-dominant cultures and languages are a disturbing consequence and indicator of social injustice. Teacher leaders have the potential to contribute to change at the school level by facilitating dialogue, initiating difficult conversations with colleagues around issues of justice and equity and inspiring responsive actions. **The purpose of this study is to influence change in Manitoba schools by determining, through participatory action research, a leadership development model with potential to develop teacher leaders for social justice.**

This letter is an invitation to participate in a teacher leadership cohort that will gather together intensively over time to develop a community of practice focused on strengthening participants' ability to lead for social justice. This research is being conducted as part of my doctoral thesis to be titled **“Developing Teacher Leaders for**

Social Justice: Building Agency Through Community, Critical Reflection and Action”. The study will be carried out under the supervision of my advisors Dr. Brian Lewthwaite and Dr. Francine Morin. My hope is that this study will help me to identify a model for teacher leadership development which can be used in various settings to develop the capacity of teacher leaders to provide leadership for social justice. This means that I will be focused on how you experience the leadership development program, what learning activities are the most useful for you, and how they move your thinking and your practice forward. I will be positioned as a co-participant in action research, a participant observer within the cohort and a facilitator of dialogue and reflection at various times in the process. Participants will have input into scheduling, topics, process, priorities, group norms and interpretation of data. Leadership over time is intended to move away from the researcher towards participants and the cohort as a whole.

Action research is a branch of methodology which focuses on seeking practical action-oriented solutions (Stringer, 2004). Action research is typically done in a series of action cycles of look, think, act, reflect, (adapted from Lewin, 1946; Stringer, 2004) with each cycle representing a new attempt to find or refine an effective solution to the problem posed. Participatory action research (PAR) is an offshoot of both action research and participatory research. PAR is uniquely suited to working with communities of learners and engaging members in group learning and data-driven decision-making.

The **four research questions** which guide this PAR study are as follows:

1. What are the knowledge, skills and dispositions that empower teacher leaders to be critical change agents in schools?
2. In what ways do the specific elements of a leadership development program assist teacher leaders in acquiring the knowledge, skills and dispositions to serve as change agents in schools?
3. How does participating in a co-constructed community of practice support teacher leaders in acquiring the knowledge, skills and dispositions to lead for social justice?
4. What leadership development model enables teacher leaders to acquire the knowledge, skills and dispositions to serve as critical change agents in schools?

Participant Involvement

In this letter of informed consent I wish to **inform you of the nature of the study and the rights and responsibilities you would have as a participant in the teacher leadership cohort** should you choose to be involved.

Involvement in this study will require a substantial time commitment but also be of potential benefit to you. We will be gathering together for at least six full days to reflect critically on our practice, learn about leadership and facilitation of adult learning, and participate in action research related to social justice. As a participant you will have access to these six full days of professional learning with a group of peers with similar personal convictions to social justice and teacher leadership. Funds are available from Manitoba Education to cover the cost of a substitute teacher for your classroom while you attend the full day group sessions of the program. You will have the responsibility for

booking and preparing for the substitute as per your usual division practice. Release time will not be provided for the learning conversations to be held at your school, so meeting to debrief with the researcher will require you to sacrifice some of your personal time. I anticipate this will be approximately an hour three to four times over the course of the program.

During these group sessions you will participate as a member of the group in the research process as we determine together through an action research process, what the best leadership development model might be to support teacher leaders in acquiring the skills to lead for social justice. You will be asked to maintain a journal, to be shared with the researcher, in which you can record notes, observations or ideas which you relate to the study. You are asked to agree to be both audio and videotaped as part of the group sessions. The videotape will preserve our conversations for further reflection and analysis by the group and the researcher. The audiotape will serve as a back-up in the case of technical difficulties with the videotaping such as poor audio quality. In addition, you will be asked to complete a self-reflection instrument three times during the program. This tool is designed to help you reflect on, develop insight into, and plan in response to your own leadership strengths and priorities. Additional tasks during group sessions will likely include participating in transformative learning experiences, appreciative inquiry and critical reflection. You will be asked to provide feedback to your peers, complete participant reflections at the end of each group session (which will be used to revise and strengthen the program) and possibly share personal experiences through dialogue and or presentations to the group. In addition you are asked to grant permission to be directly quoted by the researcher in academic publications or presentations, with appropriate procedures followed to protect confidentiality.

Between sessions you will be asked to undertake a small scale action research study in your school with a group of adults with whom you work in a leadership capacity. As the researcher I will visit you in your school and provide you the opportunity to engage in learning conversations intended to help you reflect on your practice. You will be asked to agree to be videotaped in learning conversations between yourself and the researcher, once again to contribute to the reflection process and analysis of how those conversations are useful in developing your leadership practice. You may also choose to be videotaped in your action research initiative in your school for the purpose of reflecting on your own practice either alone or with the researcher. You will have time at the group sessions to reflect on your action research initiative and to receive input and support from the other cohort members and the researcher. In action research you are free to revise your study as you see fit without fear of criticism. The study is yours to determine, manage and learn from. I want to study the impact of being involved in the process of doing action research on your confidence in leading change for social justice in your school.

One additional request will be that you identify two colleagues, one of whom could be your school administrator, who would be willing to fill out a **peer reflection** on your leadership dispositions, experiences and practices. The tool they will complete will be the same as the self-assessment you will complete on your own practice and the results will be used by both you and the researcher over time as a stimulus for discussion and

reflection. It is important to understand that the relationships and interactions you have with the peer reviewers should not be negatively affected by any of the feedback provided.

Deception

There is no **deception** in this study. I aim to be a participant researcher and co-researcher. I will be studying my own practice as a facilitator and for this reason you will be asked to provide me with feedback as well on my facilitation of the group. The data will be reviewed by me between sessions and my resulting decision about how to proceed shared with the group. Through this approach I aim to model reflective practice and action research for the group and also learn from the combined wisdom of the participants.

Feedback and Debriefing

Participants will have opportunity to review and analyze the data generated throughout, will receive copies of materials and have input into the interpretation of the data upon completion of the study. As a participant you will be entitled to contribute to the **outcomes** of the study by reviewing the data with other group members including the researcher. You will receive a copy of the outcomes of the study once it is completed.

Risks and Benefits

Risks As a participant in this study you will be exposed to minimal physical, emotional or personal **risk**. You might experience impatience and or discomfort as a result of increasing your insight into issues of social justice and critiquing your own practice. Support will be provided by both group members and the researcher as well as information provided regarding the Employee Assistance Program of the Manitoba Teachers' Society should you wish to access further supports. You have the right to withdraw from the study at any point in which case I will not make use of your individual data unless you provide me with written permission to do so. There may be some negative impact on student learning as a result of teachers being absent from their classrooms for six teaching days. As experienced teachers, participants will be experienced at leaving effective learning plans for substitute teachers. Ensuring competent substitute teachers are in place and well prepared for their responsibilities with students will be facilitated by setting dates far in advance whenever possible to allow for adequate preparation and planning to take place. Your school principal will be aware of your participation in this study. They have agreed that your status in the division will not be influenced by your participation or non-participation in the study or your withdrawal should you choose to do so at a later date. I cannot however guarantee what their personal responses may be to your decisions and any potential impact those changed perceptions may have on your position within the division.

Benefits There are a number of ways in which you may **benefit** from participating in this leadership development program. You may gain knowledge about leadership, insight into yourself as an individual teacher, learner and leader, and an increased understanding of and commitment to social justice. You may gain experience through conducting action research about how to be more effective in your leadership roles and how to carry out

action research. As a participant, you may gain skill in facilitating adult learning using critical reflection techniques such as appreciative inquiry and transformative learning. You may deepen your commitment to social justice as a result of collaborative dialogue within a group of similarly committed individuals. You will receive emotional, practical and inspirational support from the community of practice you will help co-construct and will have access to that support beyond the duration of the study. You also will have opportunity to improve your ability to reflect critically on your teaching and leadership work, a skill which is transferable to many areas of your personal and professional lives. Most significantly, as a cohort member you will have the opportunity to participate in an intensely personal learning experience, focused on topics you are passionate about, alongside colleagues who share those strong personal convictions. This experience will contribute to you becoming increasingly effective in your role as a teacher leader for social justice.

Confidentiality

Your identity in this study will be kept **confidential**. I will not identify you by name or identify your school or school division in my thesis or subsequent dissemination of findings. As a participant, you will not reference individuals by name when you report on in-school activities or contribute to group sessions. You will also not reveal to anyone outside the group who the other group members are or any contributions they make during group sessions. The digital data which I gather through this study once downloaded from the video camera or digital recorder, will be stored in password protected computers in my home and office to which only I have access. The written data will be stored in my home or office except when in use for the group sessions or in transport. All identifying data will be destroyed within three years of the completion of my doctoral defense, allowing me time to publish related academic articles and prepare for presentations. Your principal and superintendent have agreed that teachers who refuse to participate, choose to participate or choose to withdraw at a later date from the research will experience no effect whatsoever on their standing or their workplace environments as a result of their decision.

Compensation

There will be no **compensation** for you by participating in this study, although meals and refreshments will be provided and you will be released from your teaching duties for the six days of the group sessions. Substitute costs will be provided through research support made available to the researcher through Manitoba Education, as a result of a proposal submitted by the Manitoba Education Research Network (MERN). Funds will be administered through the Manitoba Teachers' Society and school divisions will be reimbursed directly for these costs.

Dissemination of Results

Results from this research will be **disseminated** through my doctoral thesis, my oral defense and academic and professional publications which may include conference presentations, book chapters, articles, on-line submission and books. As a participant you will be provided with a personal copy of the findings from the research. You will also

have opportunity to respond to the research findings in progress and request revision should you feel misrepresented or inaccurately portrayed in the study.

Withdrawal

At any point you may withdraw from this study by contacting the principal researcher at which time your data will be destroyed.

Informed Consent

Your signature on this form indicates that you have understood to your satisfaction the information regarding participation in the research project and agree to participate as a subject. In no way does this waive your legal rights nor release the researchers, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time, and /or refrain from answering any questions you prefer to omit, without prejudice or consequence. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

The University of Manitoba Research Ethics Board(s) and a representative(s) of the University of Manitoba Research Quality Management / Assurance office may also require access to your research records for safety and quality assurance purposes.

This research has been approved by the Education/Nursing Research Ethics Board. If there are any concerns or complaints about this project contact any of the above-named persons or the Human Ethics Secretariat at 474-7122, or email margaret_bowman@umanitoba.ca.

A copy of this consent form has been given to you to keep for your records and reference.

Thank-you for your interest in being involved in this research study.

Sincerely,

Cathryn Smith
Doctoral Candidate and Principal Researcher
University of Manitoba
71 Curry Place
Winnipeg MB R3T 2N2
Email Contact
Phone

Participant's Signature _____ Date _____

Researcher Signature _____ Date _____

- I would like to receive a paper summary copy of the results of this study, forwarded to the following mailing address:

-OR-

- I would like to receive an electronic summary copy of the results of this study, forwarded to the following email address:
