Navigating the complex practices of specialized literacy professionals in formalized teacher leadership positions

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NAVIGATING THE COMPLEX PRACTICES OF SPECIALIZED LITERACY PROFESSIONALS IN FORMALIZED TEACHER LEADERSHIP POSITIONS

by

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A Dissertation
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ABSTRACT

This dissertation reports on how one school community engaged in a professional development grant initiative that incorporated teacher leadership. Teacher leaders may have numerous roles and responsibilities that support the professional learning and instructional practices of school communities. This study examined the experiences of three specialized literacy professionals as teacher leaders and professional development facilitators. Case study methodology (Merriam, 1998; Stake, 2005; Yin, 2009) and the six principles of adult learning (Knowles, Holton, & Swanson, 2005) provided a framework to capture the contextual and descriptive practices of how these teacher leaders navigated their roles and responsibilities. Three important findings emerged from this study: (a) stakeholders’ visions of teacher leadership framed the roles and responsibilities of teacher leadership positions; (b) on-going professional development, web-enhanced learning tools, and administrative guidance were critical to support and prepare professionals for teacher leadership roles; and (c) professional expertise influenced how the teacher leaders facilitated teacher learning. The results of this study have the potential to inform the literacy education community about new approaches to professional development for teacher leaders, suggest implications for teacher leaders as literacy leaders and professional development facilitators, and offer information on how to formalize and define the current practices of teacher leaders.
DEDICATION

This dissertation is dedicated to the current, growing, and future literacy leaders of education.
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TABLE OF CONTENTS

ABSTRACT ..................................................................................................................................................... ii
DEDICATION ...................................................................................................................................................... iii
ACKNOWLEDGEMENTS ............................................................................................................................... iv
TABLE OF CONTENTS ....................................................................................................................................... vi
LIST OF TABLES ................................................................................................................................................... xii
LIST OF FIGURES ............................................................................................................................................... xiii
CHAPTER 1 Introduction ...................................................................................................................................... 1
  Statement of the Problem ................................................................................................................................. 1
  Purpose of this Study ......................................................................................................................................... 2
  Definition of Key Concepts and Terms .............................................................................................................. 4
  Dissertation Questions .................................................................................................................................... 6
  Significance of this Study ................................................................................................................................. 8
  Theoretical Framework .................................................................................................................................. 10
  Organization of the Dissertation ..................................................................................................................... 12
CHAPTER 2 Review of the Literature .................................................................................................................. 13
  Teacher Leadership .......................................................................................................................................... 13
    Roles and Responsibilities ............................................................................................................................... 13
    Teacher Leadership Frameworks .................................................................................................................. 16
    Specialized Literacy Professionals ............................................................................................................... 18
    Collaborative Practices of Teacher Leaders ................................................................................................ 21
  Professional Development .............................................................................................................................. 22
    Professional Learning Communities .............................................................................................................. 24
    Facilitator Roles .......................................................................................................................................... 25
    Trainers and Mentors .................................................................................................................................. 27
    Book Studies and Book Clubs ...................................................................................................................... 30
    Facilitating Book Clubs ................................................................................................................................. 31
  The Interactive Strategies Approach ............................................................................................................... 35
Social Constructivism and Mediated Learning .......................................................... 37
Adult Learning Theories .......................................................................................... 39
Knowles’ principles of adult learning ................................................................. 39
Teacher Leaders as Learners and Facilitators ...................................................... 43

CHAPTER 3 Methodology ......................................................................................... 45
Research Design .................................................................................................. 45
School Community Context .................................................................................. 46
Influential Components of this Study .................................................................. 46
Strengthening teacher and leader effectiveness grant ......................................... 47
Interactive strategies approach book study ......................................................... 49
  Phase I ................................................................................................................. 50
  Phase II .............................................................................................................. 50
Materials and resources ....................................................................................... 51
Participants ........................................................................................................... 52
District Selection .................................................................................................. 52
  Key participants .................................................................................................. 52
    Sara .................................................................................................................. 52
    Grace ............................................................................................................... 53
    Lisa .................................................................................................................. 53
  Administrators and classroom teachers .............................................................. 54
My Role within this Inquiry .................................................................................. 55
Overview of Data Collection ................................................................................ 56
Data Sources ......................................................................................................... 56
  Observations ...................................................................................................... 56
    Facilitating professional development ............................................................ 57
    Planning for professional development .......................................................... 58
    Meeting with district administrators .............................................................. 58
    Participating in professional development ....................................................... 58
    Engaging in special district events ................................................................. 59
  Documents ......................................................................................................... 59
  Interviews ............................................................................................................ 59
Focus groups .............................................................................................................. 60
Data Analysis ............................................................................................................ 61
  Analyzing Observations ......................................................................................... 62
  Analyzing Documents ........................................................................................... 63
  Analyzing Interviews ............................................................................................ 64
Reliability and Validity .............................................................................................. 65
Summary .................................................................................................................... 66

CHAPTER 4  Weston School District Implements the ISA Book Study ....................... 67
  Grant Opportunity for Weston School District .................................................... 67
    Administrative Roles/Responsibilities for the STLE-3 ........................................ 68
    Implementation of the ISA Book Study Under the STLE-3 ................................ 68
    Teacher Leadership Positions Created Under the STLE-3 ................................ 70
  Teacher Leaders Selected as ISA Book Study Facilitators .................................. 70
  Planning and Facilitating Professional Learning .................................................... 72
Summary .................................................................................................................... 75

CHAPTER 5 Evolving Roles and Responsibilities ..................................................... 77
  Role: Professional Development Provider ........................................................... 78
    Responsibility: Planning ...................................................................................... 80
    Responsibility: Facilitating Professional Development ......................................... 89
    Responsibility: Meeting with District Administrators ......................................... 90
    Responsibility: Participating in Professional Development Initiatives ................. 91
    Responsibility: Engaging in Special District Events ........................................... 92
  Role: Curriculum Developer ................................................................................. 94
    Responsibility: Curriculum Planning ............................................................... 95
    Responsibility: Curriculum Mapping ............................................................... 97
  Role: Co-teacher .................................................................................................. 98
    Responsibility: Modeling in the Classroom ...................................................... 99
    Responsibility: Modeling with Technology ..................................................... 101
  Role: Communicator ............................................................................................ 102
    Responsibility: Communicating through School Newsletters ......................... 103
    Responsibility: Communicating through E-mail .............................................. 105
Responsibility: Communicating through Surveys ............................................. 106
Perceptions of Teacher Leader Roles and Responsibilities ............................... 108
Characteristics of Teacher Leadership: Teacher Leaders .................................. 109
Characteristics of Teacher Leadership: District Administrators ......................... 112
Engagement of Teacher Leaders ..................................................................... 115
Overall Roles and Responsibilities .................................................................. 119
Summary .......................................................................................................... 120

CHAPTER 6 Support Systems for Teacher Leaders ............................................ 122
Structures ......................................................................................................... 123
Structures Created by District Administrators .................................................. 123
  Structure 1: New leadership positions ......................................................... 123
  Structure 2: Implementation of the ISA book study ....................................... 125
Summary of Structures Created by District Administrators ............................. 128
Structure Created by the ISA Book Study Developers ..................................... 128
  Structure 1: ISA book study phases ............................................................. 128
Summary of Structures Created by the ISA Book Study Developers ................. 130
Resources ......................................................................................................... 130
Resources Provided by District Administrators .............................................. 130
  Resource 1: Technology ............................................................................. 131
  Resource 2: Teacher leadership professional development .......................... 133
  Resource 3: Administrative support ........................................................... 134
Summary of Resources Provided by District Administrators ............................ 138
Resources from the ISA Book Study Developers ............................................ 138
  Resource 1: EIRD ...................................................................................... 139
  Resource 2: ISA website ............................................................................. 140
Summary of Resources from the ISA Book Study Developers ........................ 141

CHAPTER 7 Facilitating Teacher Learning ......................................................... 143
Context of the ISA Book Study in Weston School District ............................... 143
Intended Approaches of Facilitating the ISA Book Study ................................. 144
Teacher Leader as Facilitator: Sara ................................................................. 145
  Initial vision of facilitation ............................................................................ 145
Summary of Adult Learning ................................................................. 181
Potential Limitations and Directions for Future Research ................... 183
Conclusion .......................................................................................... 184

REFERENCES ...................................................................................... 186

APPENDIX A: Excerpt of STLE-3 Grant .............................................. 205
APPENDIX B: Screenshot of the Interactive Strategies Approach (ISA) Website .................. 206
APPENDIX C: Sample Page from the ISA Facilitators’ Guide .................. 207
APPENDIX D: Sample Page from the ISA Participants’ Resource Booklet .......... 208
APPENDIX E: Timeline of Data Collection: October 2014-September 2015 .......... 209
APPENDIX F: Observational Event: Facilitating Professional Development .......... 210
APPENDIX G: Observational Event: Planning Professional Development ............ 211
APPENDIX H: Observational Event: Meeting with District Administrators .......... 212
APPENDIX I: Observational Event: Participating in Professional Development ........ 213
APPENDIX J: Observational Event: Engaging in Special District Events ............... 214
APPENDIX K: Sample of Grace’s notes in the ISA Participants’ Resource Booklet .... 215
APPENDIX L: Interview Log ................................................................ 216
APPENDIX M: Individual Interview Protocol for District Level Administrators .... 217
APPENDIX N: Individual Interview Protocol for Building Level Principal .......... 219
APPENDIX O: Individual Interview Protocol for Teacher Leaders ................... 221
APPENDIX P: Questionnaire for Classroom Teachers .................................. 223
APPENDIX Q: Focus Groups Protocol: Classroom Teachers ......................... 225
LIST OF TABLES

Table 1 Observed Responsibilities of Teacher Leaders as Professional Development Providers .................................................................................................................. 79
LIST OF FIGURES

Figure 1. Knowles’ et al. (2005) six principles of adult learning. ........................................ 41

Figure 2. Overview of participating teacher leaders. .......................................................... 54

Figure 3. Codes from interview analysis ........................................................................... 65

Figure 4. Teacher leader schedule: Grace. ......................................................................... 81

Figure 5. Teaching leader schedule: Sara. .......................................................................... 82

Figure 6. Teacher leader schedule: Lisa. ........................................................................... 84

Figure 7. Sample of a teacher leaders’ planning document .............................................. 85

Figure 8. Sample of Riverside school newsletter (4/16/15). ............................................ 104

Figure 9. Sample of a teacher leaders’ e-mail correspondence with a classroom teacher. .... 106

Figure 10. Sample of survey created by teacher leaders. ................................................. 107

Figure 11. Characteristics of teacher leadership as defined by participating teacher leaders. ... 111

Figure 12. Characteristics of teacher leadership as defined by participating district administrators .......................................................................................................................... 113

Figure 13. Teacher leaders’ involvement in district service ............................................. 116

Figure 14. Levels of roles and responsibilities associated with participating teacher leaders. .. 120

Figure 15. Example of how the teacher leaders’ supported classroom teachers by creating congruent school-wide terms. .................................................................................. 127

Figure 16. Sample from presentation slide created by a teacher leader. ............................ 155
CHAPTER 1

Introduction

The overall goal of professional development is to enhance teachers’ knowledge and improve their instruction in order to increase student learning outcomes. As educational practices continue to evolve and shift over time, the associated professional opportunities also change. One of these changes involves teachers stepping into leadership roles and leading professional development within their area of expertise (Bean et al., 2015; Darling-Hammond & Sykes, 1999; Galloway & Lesaux, 2014; Quatroche, Bean, & Hamilton, 2001). Research shows this practice of teacher leadership has improved teacher retention, strengthened the teaching profession, advanced the structure of school staffing, and increased the professional learning of school communities (Calo, Sturtevant, & Kopfman, 2015; Costello, Lipson, Marinak, & Zolman, 2010; Harrison & Killion, 2007). An emphasis for on-going professional development in learning and leadership is included in the standards of several professional teaching organizations (National Board for Professional Teaching Standards, 2012; National Council for Teachers of English, 2012; International Reading Association, 2010). As teachers engage in leadership positions, they also need to build their own pedagogical knowledge of teaching practices in order to share their professional knowledge with colleagues.

Statement of the Problem

As roles for literacy educator’s shift and increase, their leadership responsibilities continue to grow (Liberman & Miller, 2004; York-Barr & Duke, 2004). Teacher leaders currently hold many job titles such as literacy coaches, specialists, and/or facilitators (Crowther, Ferguson, & Hann, 2009; Taylor, Yates, Meyer, & Kinsella, 2011). While various roles and responsibilities are typically attached to each of these job titles, most involve organizing and
leading professional development in schools (Bean et al., 2015; Dole, 2004; Quatroche et al., 2001). As teachers increasingly lead the professional learning it is important for them to understand the principles associated with adult learning theory to support of their colleagues’ knowledge and practices of literacy (Knowles, Holton, & Swanson, 2005). At the same time, it is also important to understand how the school community supports their positions.

**Purpose of this Study**

The purpose of this study is to investigate how one school community navigated professional development on early literacy instruction through a grant initiative on teacher and literacy leadership. The state education department awarded the participating school community a grant to strengthen the professional growth of teachers. During the grant implementation in the 2014-15 school year, I studied three key issues: (1) the perspectives of district administrators, teacher leaders, and classroom teachers on the roles and responsibilities associated with teacher leaders; (2) the structures and resources teacher leaders found most helpful to support their positions; and (3) the approaches teacher leaders used to facilitate their colleagues’ professional learning. Data collection included interviews, observations, and documents from within the school community in order to examine the grant initiative, professional development, and the experiences of specialized literacy professionals in formalized teacher leadership positions.

As part of this initiative, the school community chose to engage in a web-enhanced professional development book study focused on the content from *Early Interventions for Reading Difficulties: The Interactive Strategies Approach* (EIRD; Scanlon, Anderson, & Sweeney, 2010). The EIRD book centers around research on the Interactive Strategies Approach (ISA; Scanlon et al., 2010; Vellutino & Scanlon, 2002). The ISA supports children to become strategic in their reading and writing, through enabling teachers to become more strategic and
responsive in the instruction they offer (Scanlon, Vellutino, Small, Fanuele, & Sweeney, 2005; Scanlon, Gelzheiser, Vellutino, Schatschneider, & Sweeney, 2008; Vellutino & Scanlon, 2002). The primary goal of the EIRD text and the book study is to “…help teachers more thoroughly understand early literacy development and to effectively respond to, plan for, and teach the children who find reading acquisition challenging” (Scanlon, Anderson, & Sweeney, 2016, p. 4). The model for the ISA book study includes three phases of professional development.

The first phase is the primary way of preparing teacher leaders. In this phase, teacher leaders participate in a face-to-face, thirty-two-hour ISA workshop. The workshop focuses on enhancing teacher leaders’ knowledge of early literacy development and ways to support early literacy learning. The second phase follows the completion of the ISA workshop. During this phase, teacher leaders provide face-to-face professional development in their own schools based on the content of the ISA workshop, the EIRD text, web-based resources, and a highly-structured facilitators’ guide provided by the ISA Professional Development Project (Scanlon & Anderson, 2014). The ISA professional development providers encourage teacher leaders to plan for a minimum of thirty-two hours of professional development focused around these resources. The teacher leaders use these supporting materials to implement the ISA book study within their own school communities. During phase three, teacher leaders can continue to access the web-enhanced resources to provide teachers with ongoing support and guidance. After leading the book study, teacher leaders often continue to guide their colleagues’ progress with the ISA implementation process in their classrooms.

In my study, the observations of early literacy professional development focused on phase two. The exploration of this phase captured how teacher leaders facilitated the professional learning of their colleagues through the implementation of the ISA book study.
Definition of Key Concepts and Terms

A relatively new concept, the nature of a teacher leader continues to evolve in the field of education. Silva, Gimbert, and Nolan (2000) articulated waves of change for leadership in schools. During the 1980s, schools focused on hiring teachers with extensive college and teaching experience to provide high-quality education. Educational initiatives also created positions such as disciplinary department heads and/or union representative to promote teacher leadership. These roles provided teachers with leadership opportunities focused on teacher participation in decision making about district and school-wide organization (York-Barr & Duke, 2004). In the 1990s, professional development initiatives resulted in positions created to capitalize on teachers’ expertise such as curriculum leaders, team leaders, and staff developers. The staff developer positions were often limited to leaders outside of the district removed from the context of teachers’ daily work.

A further shift occurred in the 2000’s when national mandates related to student outcomes influenced a focus on student learning (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010). This shift resulted in more opportunities for teachers to take a leadership role regarding curriculum decisions within the classroom and the school community. This shift did not produce formalized positions; however, it did call attention to the leadership of practicing teachers who enabled their colleagues to improve their professional practices. Calo, Sturtevant, and Kopfman (2015) also addressed how specialized literacy professionals are serving in more teacher leadership roles such as providing professional learning opportunities as a means of supporting school-wide literacy improvement.

When considering the definitions of a teacher leader, the roles and responsibilities associated with this position are connected to enhancing teachers’ professional learning.
Professional learning refers to teachers seeking out or being provided with opportunities to enhance and reflect on their instruction to improve practices and student outcomes (Darling-Hammond & McLaughlin, 1995). This on-going process can be individual, collective, technical, and/or inquiry-based (Lieberman & Miller, 2014). In general, teacher leadership involves supporting the instructional practices of teachers by teachers.

Professional teaching standards for teacher leadership and specialized literacy professionals emphasize the roles and responsibilities these jobs entail. The International Reading Association (IRA) Standards for Reading Professionals (2010) and the research brief on the multiple roles of school-based specialized literacy professionals (International Literacy Association, 2015) categorized teacher leadership into three separate positions: literacy specialist/reading teacher, literacy coach, and facilitator or coordinator.

In the literacy field, one example of a teacher leader is a literacy specialist/reading teacher. Traditionally, these specialists work directly with students in classrooms or small group pull-out settings (Walpole & McKenna, 2013). Recently, this role is shifting such that these professionals are expected to play a more central role in mentoring and supporting teachers with high-quality literacy instruction (Bean et al., 2015; Galloway & Lesaux, 2014). Additionally, the International Reading Association (2010) emphasized supporting teacher learning as part of the responsibilities associated with both reading specialists and literacy coaches.

A second example of a teacher leader is a literacy coach. A description of a literacy/reading coach, as defined by the International Reading Association (IRA, 2010) is a literacy specialist with leadership skills who instructs and supports teachers implementing literacy programs and practices. A literacy coach may also be referred to as a reading or instructional coach. The International Reading Association (IRA, 2010) and the National
Council of Teachers of English (NCTE, 2012) prefer the term literacy coach because this term suggests educators are coaching teachers to improve literacy instruction in all areas of language arts.

A third example of a teacher leader is a facilitator or coordinator. This position involves working with the school and/or community district-wide to foster professional growth and learning (Darling-Hammond, Bullmaster, & Cobb, 1995). Traditionally, professional development has been led by outside experts who focus on a pre-determined set of skills or objectives (Brown & Woods, 2012; Killion & Simmons, 1992). These experts may also use more direct teaching approaches for delivering information (Darling-Hammond et al., 1995). In contrast, facilitators often guide practitioners’ discussions. For example, facilitators may attend to the needs of participants by strategically posing questions and supporting conversations to create a community of professional learning. Killion and Simmons (1992) described facilitators as orchestrators of interactions that can lead to changes in instructional practices and knowledge. As professional development facilitators, teacher leaders may engage in both direct teaching approaches and guiding conversations in professional learning communities (Giles & Hargreaves, 2006; Linder, 2011). These distinctions identify a need to examine the support teacher leaders may need as both learners and facilitators.

**Dissertation Questions**

School improvement and reform efforts have emphasized the need to invest in resources to support teachers’ professional development (Taylor, Raphael, & Au, 2011). High-quality professional development, strong building leadership, and district support are needed to successfully sustain school reform efforts (Fink & Brayman, 2006; Giles & Hargreaves, 2006). Similarly, the findings from literacy research have emphasized leadership as contributing to the
quality and effectiveness of teaching, as well as the ability to sustain teachers’ professional learning (Crowft, Coggshall, Dolan, Powers, & Killion, 2010; Flint, Zisook, & Fisher, 2011). Professional development can also require teachers to act as facilitators in supporting connections between learning and teaching (Darling-Hammond & McLaughlin, 1995; Darling-Hammond, Wei, Andree, Richardson, Orphans, 2009; Hirsh, 2009). While research examines the multiple roles and responsibilities of teacher leaders to support the professional learning and instructional practices of their colleagues (Lieberman & Miller, 2004; Linder, 2011; York-Barr & Duke, 2004), there is a need to document approaches to professional development that support teacher leaders as both learners and facilitators.

In this dissertation, I examined how a group of teacher leaders supported professional development initiatives in one school community. The school is a primary (K-2) building within a larger school district. A case study approach documented the process, planning, and facilitation of three teacher leaders and three administrators who engaged with their school community with the intent to improve literacy practices through facilitating professional development. Data collection and analysis examined the role(s) and responsibilities of these teacher leaders as colleagues, facilitators, and leaders. The following research questions guided this dissertation:

1. Within the grant initiative, what were the evolving roles and responsibilities of teacher leaders?

2. When implementing the grant initiative, what structures and resources did the teacher leaders find most helpful as learners?

3. In what ways do teacher leaders in a primary (K-2) school facilitate teacher learning to support early literacy instruction?
Significance of this Study

This study contributes to the research on teacher leadership, specialized literacy professionals, and professional development to improve the knowledge and practices of literacy instruction in four important ways.

First, I examined the experiences of current specialized literacy professionals in these formalized teacher leadership positions to capture the evolving roles and responsibilities associated with teacher leaders. In doing so, I unpack how the grant and professional development initiatives influenced the vision of teacher leadership within this school community. These findings are important in determining the multiple perspectives of teacher leadership as defined by one school community. These interpretations inform the various roles and responsibilities associated with teacher leadership at both the local and state levels. For example, in 2014, the United States policymakers in sixteen states had current or proposed certification endorsements or frameworks related to teacher leadership (ASCD SmartBrief, 2014; Natale, Gaddis, Bassett, & McKnight, 2013). However, some state-level policies formalize teacher leadership through alternative approaches or district-level initiatives focused on school reform (ASCD SmartBrief, 2014). As a result, there are various definitions, frameworks, and understandings of the roles and responsibilities for teacher leaders (Calo et al., 2015).

These various interpretations are also addressed in a national survey of 2,500 literacy professionals which suggested an inconsistency related to the roles and responsibilities of literacy leaders (Bean, Dole, Nelson, Belcastro, & Zigmond, 2015). This inconsistency implies a need for a vision of teacher leadership practices, but to do so will require understanding of how current teacher leaders are navigating their positions. The analysis of their experiences is intended to contribute to formalized frameworks and evolving definitions of teacher leadership.
Second, my study examined the structures, resources, and types of support teacher leaders may need as learners. Standards from three significant professional teaching organizations (National Board for Professional Teaching Standards, 2012; National Council of Teachers of English, 2012; International Reading Association, 2010) emphasize the need for teacher leaders to be active participants in their own professional learning and that of their colleagues. In a national survey distributed to 250 literacy coaches, 75% of the participants stated that they received ongoing professional development on leadership topics such as adult learning and engaging with stakeholders (Calo et al., 2015). At the same time, 93% of literacy coaches identified themselves as leaders within their school, but only 66% considered themselves leaders within their own district (Calo et al., 2015). While current teacher leaders engage in professional development to support their own learning, there is still limited research on ways in which school districts foster a common vision and support systems for teacher leaders throughout the district.

Third, my study examined the structures, resources, and types of support teacher leaders received from district administrators and professional development providers to support their facilitation. Research on professional development suggests that teachers need workshops and embedded support within their schools and classrooms (Darling-Hammond & Sykes, 1999; Dole, 2004). Currently, with teacher performance evaluations, there is also a need for educators who can provide the professional development needed to support teachers in improving their classroom practices (Darling-Hammond, Aimrein-Beardsley, Haertel, & Rothstein, 2011). Many teachers are now taking on the role of leading the professional learning of their colleagues (Goe, Biggers, & Craft, 2012). My study adds new understandings to the education and literacy field on using a web-enhanced book study approach to support teacher leaders as facilitators. This
focus is particularly important given that there is an absence of research on teacher leaders as facilitators using web-enhanced book studies. The experiences, support systems, and strategies of teacher leaders in this role may also inform efforts towards facilitating high-quality approaches to literacy-based professional development.

Currently, educational policymakers are focused on state initiatives regarding teacher quality and effectiveness (Bean et al., 2015; Goe et al., 2012; U. S. Department of Education, 2014). Many states are also actively implementing the Common Core State Standards (CCSS; National Governors Association Center for Best Practices, 2010) and Response to Intervention (RtI; National Association of State Directors of Special Education, 2005), which have led to many grant initiatives on professional development to increase teachers’ knowledge of instruction and intervention (Costello et al., 2010; Scanlon et al., 2008; Walker-Dalhouse et al., 2009). Teachers engaging in these initiatives have the potential to individually, collectively, and formally impact the school community to improve teaching and learning practices (Bean et al., 2015; Calo et al., 2015). At the same time, many grant initiatives have also impacted the positions and responsibilities of teachers and specialized literacy professionals to become agents of change for the school community (Bean et al., 2015; Galloway & Lesaux, 2014). Therefore, it is important to investigate educators’ involvement under a grant initiative on professional development and teacher leadership to inform policymakers, administrators, and researchers on how to support and sustain current and future teacher leaders.

**Theoretical Framework**

In the field of education, scholars have developed multiple theories, models, and sets of principles to understand how adults learn based on their experiences with children and other adults. For example, theories of adult learning have been applied to research on professional
development and literacy coaching to better understand how teachers can provide effective and sustainable learning opportunities for their colleagues (Swift & Kelly, 2010). The framework for this study is based on Malcolm Knowles’ core principles of adult learning, referred to as andragogy. These core principles identify ways adults engage in learning to suggest how adults benefit from designing and understanding the relevance of learning. The six principles of adult learning theory (Knowles, Holton, & Swanson, 2005) include: (1) the learners’ need to know, (2) self-concept of the learner, (3) prior experience of the learner, (4) readiness to learn, (5) orientation to learning, and (6) motivation to learn. In the context of this study, the data analysis applied the six principles of adult learning to the individual and collective experiences of participants (Knowles et al., 2005). Adult learning theory had the potential to capture the evolving roles and responsibilities associated with both specialized literacy professionals and teacher leaders.

In addition to adult learning theory, it is also important to understand teacher leaders as facilitators of learning. Educational reform efforts and professional teaching organizations recognize teacher leaders as facilitators of their colleagues’ professional learning (Danielson, 2006; Darling-Hammond et al., 1995; Neumerski, 2013). The nature of facilitators’ roles requires collaborating with other professionals to learn, share, and reflect on instructional practices (Katzenmeyer & Moller, 2009; York-Barr & Duke, 2004). Social constructivism (Vygotsky, 1978; Wertsch, 1991) provides a framework to examine engagement of teacher leaders with classroom teachers. This theory also informs understandings of teacher leaders’ engagement with their colleagues as professional development facilitators.
**Organization of the Dissertation**

This first chapter serves as an introduction to this study. Chapter two guides this study with a review of previous and current literature related to the Interactive Strategies Approach, perspectives on teacher leadership, the shifting nature of professional learning/development, and the facilitation of professional development. Chapter three presents the theoretical and methodological frameworks for this study. This follows with a chapter that situates the context of this one school community to capture the experiences of participants within this case study. The findings from the three research questions are presented in chapter five through seven. Chapter five explores the evolving roles and responsibilities of teacher leaders, chapter six describes the support systems for teacher leaders, and chapter seven examines the facilitation of teacher learning. Finally, chapter eight interprets the main findings in relation to current research and professional literature, and shares implications for both theory and practice.
CHAPTER 2

Review of the Literature

To provide background research on this study, the literature review examines four key areas: (1) perspectives on teacher leadership; (2) the shifting nature of professional learning/development; (3) facilitation of professional development; and (4) the Interactive Strategies Approach. The selected literature incorporates the application of adult learning theory to research focused on teacher leadership, professional development, and facilitation. The examination of this literature supports the purpose and significance of this study to capture the evolvement of teacher leaders as both learners and professional development facilitators, and the systems that support their leadership.

Teacher Leadership

Educational research commonly defines teacher leaders as educators who build knowledge of teaching practices and then share that knowledge with colleagues. Danielson (2006) describes teacher leaders as active lifelong learners who “…understand that a school’s effectiveness with its students depends on the skill of every member of the faculty. Therefore, teacher leaders work steadily, but sensitively, to engage all members of the staff in important professional learning” (p. 81). As teacher leaders communicate within their school or district they may need to engage in various roles and responsibilities that transform their position (Darling-Hammond & Sykes, 1999).

Roles and Responsibilities

The responsibilities of teacher leaders have changed over time. York-Barr and Duke (2004) analyzed literature on teacher leadership from 1980-2004 and discovered that responsibilities varied depending on the context and needs of a school or district. Their findings
suggest six key domains of practice for teacher leaders: (1) coordination and management; (2) school or district curriculum work; (3) professional development of colleagues, participation in school change and improvement initiatives; (4) parent and community involvement; (5) contributions to the profession of teachers; and (6) pre-service education (York-Barr & Duke, 2004). In addition to the domains of practice York-Barr and Duke (2004) identified, Crowther et al. (2009) analyzed the characteristics of highly effective teachers in school districts based on student outcomes. Crowther and his colleagues identified striving for pedagogical excellence as a common characteristic. This characteristic suggests that a critical responsibility of teacher leaders is to advance and seek further knowledge in their field, as well as to share that knowledge with not only their colleagues, but also the educational field. To that end, Bean et al. (2015) suggested teacher leaders need support to advance their knowledge on leadership, instructional practices, and adult learning. For example, the United States School and Staffing Survey (2000-2008) surveyed leaders of professional development and reported an increase in the number of teachers as presenters or facilitators of school-related professional development (U.S. Department of Education, 2009). Frequently, teacher leaders receive support from administrators or outside experts (Hoffman & Pearson, 2000; Kisch, 2009), but it is important to understand the types of support teacher leaders identify as most helpful.

In prior studies of teacher leaders, researchers identified expertise such as instructional skills and teaching experience as contributing factors that impact their colleagues and the school community (Lieberman, Saxel, & Miles, 1988; Snell & Swanson, 2000; Stone, Horejs, & Lomas, 1997). For example, in a qualitative case study, Lieberman et al. (1988) examined the skills, abilities, and approaches teacher leaders utilized to build collegiality in schools. To identify leadership skills that impacted school culture, they spent three years observing seventeen former
teachers who took on leadership roles. In spite of the teachers’ differences in context and teaching styles, Lieberman et al. (1988) identified common factors that impacted the school community such as building trust, support, skills, and confidence in others. The researchers attributed these common factors to the expertise and credibility of the former teachers. Similarly, Stone, Horejs, and Lomas (1997) found that extensive teaching experience, such as ten or more years in the classroom improved the professional practice of collaboration among colleagues. The researchers analyzed the commonalities and differences in teacher leadership using a case study approach at the elementary, middle, and high school levels. They distributed a survey to classroom teachers at each site asking them to identify the qualities of teacher leadership and whom they perceived as the teacher leaders within their school building. Based on their selection, Stone et al. (1997) determined teacher leaders have extended teaching experience, encourage collaboration, and engage in professional decision-making.

The quality of teacher leaders’ extensive teaching experience can also be associated with their knowledge of disciplinary practices. For example, Snell and Swanson (2000) conducted a two-year case study of the leadership qualities of ten middle school teacher leaders. Using interviews, portfolios, and group observations, four themes emerged as dimensions of leadership: empowerment, collaboration, reflection, and expertise in content and teaching practices. The teacher leaders in Snell and Swanson’s (2000) study credited intensive high-quality professional development as a contributing factor to increasing their expertise within their discipline. However, this study does not address the methods of professional development that supported these teacher leaders; rather it emphasizes the importance of teacher leaders having expertise in their discipline. Snell and Swanson’s (2000) study noted that teacher leaders not only provide
professional development, but also found that they still require professional development in order to be knowledgeable and stay relevant in discipline specific practices.

**Teacher Leadership Frameworks**

The evolvement of teacher leadership has resulted in many states and professional organizations developing teacher leadership frameworks. These frameworks identify specific skills, roles, and responsibilities of teacher leaders. Therefore, it is important to explore a range of frameworks to understand the expectations and goals for practicing teacher leaders. While there are multiple teacher leadership frameworks, this review provides a selected sample to capture the core characteristics and expectations of teacher leaders.

The Center for Strengthening the Teaching Profession (CSTP, 2009) published a three-part framework for teacher leaders including dispositions, knowledge and skills, roles and opportunities. The CSTP (2009) framework also offered five categories of knowledge skills and dispositions that teacher leaders need, including: (1) working with adult learners, (2) communication, (3) collaborative work, (4) knowledge of content and pedagogy, and (5) systems thinking. One of the categories, systems thinking, suggests ways teacher leaders can navigate and receive support from stakeholders.

The Kentucky Teacher Leadership Framework (Kentucky Department of Education, 2015) is a second framework suggesting various ways teacher leaders can lead. The six dimensions of this framework include teacher leaders leading: (1) within the classroom, (2) through modeling and coaching, (3) with groups and teams, (4) to increase teacher voice and influence, (5) to professionalize teaching, and (6) to connect to larger community and world. These six dimensions from the Kentucky Teacher Leadership Framework (2015) are similar to the CSTP (2009) core beliefs, dispositions, and knowledge and skills.
The Teacher Leadership Competencies (2014) resulted from a collaboration by the Center for Teaching Quality, National Board for Professional Teaching Standards, and the National Education Association. The competencies focus on a larger organizational systems for leadership in three areas: (1) instructional leadership, (2) policy leadership, and (3) association leadership. They describe how the role of a teacher leader is not sequenced and can be navigated through these various leadership areas selectively or simultaneously. The competencies differ from the Kentucky Teacher Leadership Framework (2015) and the CSTP (2009) framework to include an emphasis on the influence of teacher leadership on reform and policy.

The Professional Learning Organization recommends Learning Forward (2016) as a systematic approach to elevating teacher leadership. The Learning Forward (2016) framework provides districts with a structured tool to reflect on and/or evaluate teacher leadership positions. Specifically, this framework recommends actions, poses questions, provides scenarios, and offers approaches for action related to components that make up system of teacher leadership. The four components that Learning Forward (2016) recommends for teacher leadership include the: (1) definition of teacher leadership, purpose, roles, and responsibilities, (2) creation of conditions for successful leadership, (3) cultivation of dispositions for teacher leaders, and (4) assessment of the impact of teacher leaders. In addition, this framework introduces a set of ten assumptions often associated with teacher leaders and the offers a clarifying set of assumptions to better understand the positions of teacher leaders. This framework attempts to create consistency and congruency to the evolving definition of teacher leadership.

The frameworks described provide educators with guidance to shape the definition of teacher leadership and support clarity and consistency of roles and responsibilities associated with teacher leaders. The frameworks can also serve as guideposts for teachers to learn and
reflect on their practices. Therefore, it is important to examine the experiences of practicing teacher leaders to further exemplify the design and recommendations of these frameworks.

**Specialized Literacy Professionals**

A common quality identified in educational research that is often associated with teacher leaders is their extended knowledge in specific disciplinary areas (Gibson, 2005; McGatha, 2008; Walpole & McKenna, 2013). The position of a literacy coach is often associated with the same qualities as those of a teacher leader. The International Reading Association (IRA, 2010) defines a literacy/reading coach as a literacy specialist with leadership skills who instructs and supports teachers in implementing literacy programs and practices. The IRA (2010) developed this description based on professional expertise and research in the literacy field. Literacy coach positions were initially influenced by *Reading First*, a federal literacy project driven by the No Child Left Behind Act (Deussen, Coskie, Robinson, & Autio, 2007; Steinbacher-Reed & Powers, 2011). As part of *Reading First*, the funding required states to hire and fund literacy coaches in low-performing primary schools so they could support their colleagues to improve reading outcomes for students.

The roles and responsibilities of literacy coaches may require negotiating between responsive and directive roles. Dozier (2006) suggests that “responsive literacy coaching is about learning--learning together, collaborating with colleagues, reflecting, and creating spaces for inquiry” (p. 139). Dozier’s (2006) model for responsive literacy coaching involves parallel learning goals for both literacy coaches and teachers learning alongside each other, as well as teacher’s learning alongside students. Responsive literacy coaches support teachers in reflecting on their practices through joint productive activities (Dozier, 2006; Tharp & Gallimore, 1998). Dozier (2006) describes joint productive activities as “…the shared events between coaches and
teachers that result in collaborative production of new learning” (p. 34). This action of teachers and coaches inquiring in spaces together creates communities of practice (Dozier, 2006; Lave & Wenger, 1991). While in these joint productive activities literacy coaches can enact the role the knowledgeable other, as co-learners, rather than experts (Cambourne, 1995; Dozier, 2006). In contrast to responsive coaching, Killon (2008) suggests directive literacy coaching involves taking on the role of an expert to assert instructional practices.

To understand the differences between responsive and directive behaviors, Ippolito (2010) studied a focus group of fifteen literacy coaches across multiple districts. These coaches indicated they needed to negotiate between their roles and responsibilities of being responsive (coaching for teacher self-reflection) and/or directive (coaching for the implementation of particular practices). Ippolito (2010) determined there needed to be an explicit understanding of the expectations among teachers, coaches, and principals to create a balance of responsive and directive coaching. The implications for this study suggest that administrators and literacy coaches may need explicit descriptions of literacy coach roles to better support teachers with instructional literacy practices.

In additional studies on the roles and responsibilities of literacy coaches, Walpole and McKenna (2004) observed literacy coaches from schools in Iowa, Virginia, Georgia, and Delaware engaging in a different legislative initiative titled the Reading Excellence Act. Based on their interviews with coaches and principals, Walpole and McKenna (2004) found that literacy coaches from these schools fulfill their leadership roles in specific ways. They suggested that literacy coaches are grant writers, learners, school-level planners, curriculum experts, researchers, and teachers. The recommendations drawn from their handbook for literacy coaches were based on the knowledge of coaches specifically involved in school-wide and state
reform. Although each of these roles is instrumental, to Walpole and McKenna (2004) and Commeryras and DeGroof (1998) the most significant role of a literacy coach is that of learner. As collective leaders in school-wide reform and change, literacy coaches model the importance of being informed on current research and instructional practices.

In a later study, Walpole and Blamey (2008) interviewed seventeen literacy coaches from Georgia who were part of the implementation of the Reading Excellence Act. These coaches described their current roles as assessors, curriculum managers, formative observers, modelers, teachers, and trainers. The results of both studies (Walpole & Blamey, 2008; Walpole & McKenna, 2004) suggest that roles and responsibilities of coaching often overlap and change over time. Literacy coaches may describe their roles and responsibilities differently as they learn to balance and negotiate reform while maintaining a leadership presence.

The qualifications and support of literacy coaches in leadership positions can also vary widely. States and school districts have different requirements for the teaching experience and educational background of literacy coaches. With minimal funding for this position, some isolated literacy coaches do not have colleagues for collaboration. Research has also identified a need for literacy coaches to receive additional support and preparation. Scott, Cortina, and Carlisle (2012) examined the professional training and literacy knowledge of 105 Reading First literacy coaches across Michigan. In a questionnaire completed by these literacy coaches, 67% felt prepared for their current position as a literacy coach. While more than half of these literacy coaches felt prepared, when asked if they would like to know more about adult learning theory, 62% of literacy coaches were interested. This finding suggests that more than half of these coaches, who are already leading the learning of their colleagues, felt they needed more information on adult learning to support their current positions. The researchers recommend
literacy coaches receive continuous support (e.g., resources, professional development, administrative) and preparation to improve the literacy practices of their colleagues.

The interactions teacher leaders have with their colleagues and administrators can also impact how they speak or behave in specific settings or with specific people (Gee, 1999, 2000). Across the various studies, there are similar findings about the roles and responsibilities literacy coaches enact daily such as curriculum planners, assessors, learners, and mentors (Dozier, 2006; Ippolito, 2010; Rainville & Jones, 2008; Walpole & McKenna, 2004). For example, Rainville and Jones (2008) examined multiple case studies to articulate the various identities that a literacy coach must enact throughout the day. Rainville and Jones (2008) applied Gee’s (1999) theory of “situated identities” and investigated the shifting of both roles and social positions. This analysis led Rainville and Jones (2008) to identify the roles of literacy coaches as: (1) experts, (2) co-learners, and (3) outsiders. These literacy coaches negotiated between identities and recognized how power was not evenly distributed in their roles. This finding suggests the role of a teacher leader involves expertise of specific content, but also co-learning new content or increasing their own knowledge (Rainville & Jones, 2008). Therefore, it is important to examine support systems for teacher leaders as learners and then how they support their colleagues’ learning.

**Collaborative Practices of Teacher Leaders**

Teacher leadership can influence school-wide instructional practices resulting in positive student achievement. In a longitudinal study on teacher change, Camburn (2010) selected a sample of 80 public elementary schools implementing three comprehensive school reform initiatives designed to improve student achievement through instructional change. Within each initiative, the school district also created teacher leadership positions intended to support teachers’ adoption of new instructional practices. These leadership positions include coaches,
Camburn (2010) analyzed survey data from 1,540 teachers investigating how their participation in embedded learning opportunities was related to their engagement in reflective practice. The researcher found that teachers who spent more time working on their teaching with peers and instructional experts were more likely to engage in reflective and collaborative practices. This study suggests that on-the-job learning increases in the school community when school districts provide opportunities for teacher leaders to work with teachers in their classrooms.

In another study on the collaborative practices of teacher leaders, Parise and Spillane (2010) examined 30 elementary schools providing on-the-job learning experiences from teacher leaders. The researchers found that instructional changes in math and English language arts were associated with interactions with colleagues. This study suggests on-the-job-learning from teacher leaders can impact instructional change. Working together and creating spaces for collaborative and reflective practices can also lead to teachers taking ownership of their instructional practices. In addition to on-the-job learning experiences, teacher leaders can also plan or lead professional development. Therefore, it is important to understand how teacher leaders are engaging in professional development to enhance their colleagues’ professional learning.

**Professional Development**

Professional development offers learning opportunities strategically designed to increase adults’ knowledge and practices (Desimone, 2011; Lieberman & Miller, 2014). The term ‘development’ is related to the increase of learning, but can also be viewed as building knowledge by stages or levels (Stoll & Louis, 2007). Teachers engage with the school community in multiple ways through professional development because they bring a range of
experiences to their learning and can be at different stages in their own development (Knowles, 1970; Martin, Kragler, & Quatroche, 2015; Merriam, 2001). The goal of professional development for educators is to transform schools and improve the academic achievement of students by creating learning opportunities (Brown & Woods, 2012; Darling-Hammond et al., 1995; Lieberman, 2000). These learning opportunities differ in terms of both models and approaches.

Traditionally, federal and school-reform efforts led to staff development or in-service training models conducted by experts outside of the school (Dillon, O’Brien, Sato, & Kelly, 2011). Research on traditional models of teacher support indicates that districts, schools, or teachers initially adopted instructional practices that were not sustainable (Darling-Hammond et al., 2009; Duffy, 1994). For example, Saxe, Gearheart, and Nasir (2001) compared the effectiveness of professional development programs from three groups: (1) traditional textbook with no support or time to work with others; (2) professional community-based activity offering teachers’ external support; and (3) facilitating discussions around pedagogical content knowledge necessary to teach this content. Comparing these three types of support, student achievement (e.g., conceptual understanding and test scores) improved the most through facilitation of discussions specifically focused on deepening teachers’ content knowledge and instructional practices (Saxe et al., 2001). The study from Saxe and his colleagues showed that the facilitation of teachers’ knowledge around pedagogy and content, along with guiding discussions with their colleagues positively impacts student outcomes.

Presently, school-based professional development can be school-based and is often centered on the active participation and collaboration of teachers in the context of their own school (Crowft et al., 2010; Hawley & Valli, 1999). School-based professional development
uses a bottom-up model that is grounded in the shared experiences and interactions of teacher practices and school cultures (Hanraets, Hulsebosch, & Laat, 2011; Hawley & Valli, 1999; Lave & Wenger, 1991). This design creates spaces where multiple perspectives and experiences come together to create a common vision of strategic instructional approaches (Dillon et al., 2011). As part of the U.S. Department of Education’s School Improvement Grant (Dragoset et al., 2017) and the National Staff Development Council’s Report on Teacher Development in the United States and Aboard (Wei, Darling-Hammond, Andree, Richardson, & Orphanos, 2009) a school-based design of professional development is recommended to sustain teachers’ knowledge over time. This design focuses on teachers supporting their colleagues with resources, strategies, and practices (Darling-Hammond & McLaughlin, 1995; Hirsch, 2009).

Research in reading education argues for active professional learning opportunities connected to teachers’ instructional practices to improve students’ reading achievement (Darling-Hammond et al., 1995; Dole, 2004; Lieberman, 2000). For example, the International Reading Association (2010) has Professional Learning and Leadership as a standard for reading professionals to emphasize a commitment by all reading professionals to be lifelong learners. Unlike in-service and staff development models, professional learning relies on both inside teacher knowledge and outside expert knowledge (Lieberman & Miller, 2014).

**Professional Learning Communities**

The organization and structure shifted some schools to create a form of professional development known as professional learning communities (Vescio, Ross, & Adams, 2008). A professional learning community (PLC) is often a collaborative group of educators reflecting on their instructional practices to enhance student learning (Katzenmeyer & Moller, 2009; Lieberman & Miller, 2004; Stoll & Louis, 2007). Ford, Branch, and Moore (2008) suggest the
formation of a PLC requires strong leadership to promote and sustain the conversations on learning, reflection, and the focus on student achievement.

While the goals of professional development may be similar to a PLC, there are distinct differences in these models. DuFour (2004) suggests three key ideas that represent the core principles of professional learning communities: (1) ensuring that students learn, (2) creating a culture of collaboration, and (3) focusing on student results. Stoll and Louis (2007) explain the shift from professional development to PLC stating, “Collective learning departs from traditional forms of professional development, which emphasize opportunities for individuals to hone their knowledge and skills in and out of their school setting. Learning in the context of professional communities involves working together towards a common understanding of concepts and practices” (p. 3). While a professional development model may involve listening to an outside expert, a PLC creates shared language and vision through collaborative discussions with the school community.

**Facilitator Roles**

While extensive research focuses on various designs and models of professional development for literacy instruction and intervention, little emphasis has been placed on the roles of professional development facilitators (Darling-Hammond et al., 2009; Dillon et al., 2011; Linder, 2011). In some cases, teacher leaders may be appointed to facilitate without any preparation or guidance (Duffy, 1994; Linder, 2011). In more recent models, teacher leaders may have a facilitator role in school-based professional development and online professional development, with the responsibility for increasing and supporting their colleagues’ instructional knowledge (Linder 2011; McConnell, Parker, Eberhardt, Koehler, & Lundeberg, 2013).
In recent years, professional development facilitators are often educators working within the same school or district as their participants. Linder (2011) describes the essential characteristics of facilitators as involving high levels of content knowledge, the ability to problematize instructional practices, and the ability to modify experiences to fit participants’ contexts. Along with these facilitator characteristics, there is also a need to understand what support should be provided to teachers as professional development facilitators.

As professional development facilitators, teacher leaders are in the position to support and enhance the professional learning and instructional practices of their colleagues. In a recent study, Linder (2011) asked elementary teachers to identify influential characteristics of state-hired mathematics coaches who facilitated professional development. These teachers experienced two different mathematics content-focused models of professional development: (1) ongoing, or (2) isolated one or two-day experience. After semi-structured interviews, five themes emerged as being influential characteristics of facilitators: (1) credibility, (2) support, (3) motivation, (4) management, and (5) personality. The teachers in the on-going model described the support they received from facilitators as influential to their learning, while the isolated model identified the need for more continuous support. As a result of this study, Linder (2011) emphasized the importance of facilitators to support teachers learning, but also suggested a need for further research on the continuous support provided by facilitators.

The role of a facilitator is not always confined to meeting face-to-face in schools. Research also focuses on teacher leaders facilitating online networks to establish a virtual professional learning community (e.g. Ford, Branch, & Moore, 2008). Face-to-face professional development is limited by space, time, and travel constraints (McConnell et al., 2013). Virtual professional learning communities are online meetings, where reflections and interactions are
initiated through a group website designed for communicating about specific content. This platform offers extended opportunities for teachers from different schools or districts to meet online.

As school districts are investing in new approaches to professional development the role of the facilitator is becoming increasingly important to guide the professional learning of the school community. To provide the facilitators with the appropriate structures, resources, and types of support it is essential to address the differences between this role and the role of trainers and mentors.

**Trainers and Mentors**

To help guide and improve instructional practices, teacher leadership roles such as mentoring or training can be used to support teachers’ learning. Mentors and trainers are important for adult learning as they offer professional instruction and guidance towards development of a set of skills to increase teachers’ knowledge (Killion & Simmons, 1992; Vaughn & Coleman, 2004). Current and previous research on trainers and mentors related to professional development can help to distinguish these roles from facilitators.

Trainers are often outside experts who provide direct information on teaching skills to teachers (Killion & Simmons, 1992). Hoffman and Pearson (2000) describe the term *training* as direct actions designed to enhance one’s ability to do an activity fluently and efficiently. Unlike facilitators or mentors, trainers often provide one-day prescribed workshops with the expectation that teachers will implement their skills regardless of content or context (Little, 1993). There is also a distinction between trainers and facilitators/mentors. Training is often associated with operational skills or routines (Hoffman & Pearson, 2000). For example, mentors and facilitators
often have interactive discussions about individuals’ teaching experiences and practices, whereas trainers may not take into account these individualized differences.

Trainers can also use a multiplier or turnkey approach to professional development. Berman and Friederwitzer (1985) describe this approach as follows: “Selected teachers or supervisors are trained in a particular topic by consultants, curriculum coordinators, or other educational personnel. These individuals subsequently act as ‘turnkey’ leaders in their own school or districts. As the turnkey leaders conduct in-service programs for colleagues, the benefits of their original training are multiplied many times” (p. 34). In other words, a turnkey approach involves training the trainer. While this method helps teachers to explicitly develop a set of skills, it does not necessarily create opportunities for teachers to reflect or collaborate in order to develop personal or professional learning communities (Hoffman & Pearson, 2000). Reflecting and collaborating are approaches that mentors use with their colleagues, with research suggesting mentors may also require additional support.

Mentors are commonly experienced professionals, in or outside of schools, who support and guide novice teachers in their new positions (Vaughn & Coleman, 2004). Unlike facilitators, mentors typically work one-to-one with teachers providing individualized support. Facilitators often work in small or large groups of adults to guide meaningful conversations, which could require additional support and resources. In a study on the effects on mentoring, Evertson and Smithey (2000) compared the practices from two groups: (1) 23 novice teachers assisted by mentors that participated in a mentor workshop, and (2) 23 novice teachers mentored by non-participating mentors. In the workshop, mentors engaging in multiple areas of study such as: (a) analyzing the characteristics of adult learners; (b) practicing communication skills; and (c) observing and providing feedback to adults. The researchers collected data through classroom
observations, reflections of the mentoring activities, and the ratings of students’ classroom
behavior. Evertson and Smithey (2000) found that novice teachers had better classroom
routines, management, and student engagement when they were assigned to mentors who had
participated in the workshop.

Mentors not only work with novice teachers, but also guide experienced teachers to
implement new curriculum guide or new instructional practices (Gold, 1999). Vaughn and
Coleman (2004) provided six elementary teachers with a year of extensive preparation and
experience provided by university researchers using specific reading strategies. The following
year, the same teachers served as mentors to their colleagues by teaching, coaching, modeling,
and providing feedback related to the instructional strategies they learned. The researchers
collected data through pre-and post-interviews, classroom observations, and teacher
implementation logs. Similar to the findings of Evertson and Smithey (2000) teachers’
instructional practices changed as a result of their experience with mentors. Both studies also
suggest that while mentors can provide professional and individual guidance to teachers they
may need their own form of professional development to help them support others with
instruction.

District administrators and coordinators design the position of trainers to improve teacher
quality and instruction, but as Hoffman and Pearson (2000) suggest, there is a need to go beyond
“training teachers” to “teaching teachers.” With current policy changes and new initiatives there
is a need for teachers to extend their knowledge on changes in education and instructional
practices (Bean et al, 2015; Goe et al., 2012). To do this, schools depend on teacher leaders to
act as both mentors for teacher and facilitators of professional development designed to promote
professional learning communities and improve school-wide instructional practices (Dole, 2004; Quatroche et al., 2001).

**Book Studies and Book Clubs**

Professional book studies, or book clubs, have been regarded as a collaborative method for educators to reflect on their instructional practices, discuss current topics or research, and construct new understandings (Burbank, Kauchak, & Bates, 2010; Flood & Lapp, 1994). Often referred to as book clubs, these groups are composed of individuals who meet regularly to discuss a mutually selected professional text (Flood & Lapp, 1994; Kooy, 2006). There is research on the structure, conversations, and impact of book clubs with children (McMahon & Raphael, 1997) and the use of professional book studies with preservice teachers (Florio-Ruane, 2001). However, there is only minimal research on professional development book clubs (Smith & Galbraith, 2011).

Professional book studies often include adult learners within a similar field studying the content of professional texts related to that field. Smith and Galbraith (2011) identified the methods of learning from a professional book study as self-directed, conversational, and group-directed. This learning can be facilitated by group members or by individuals. Book studies are opportunities for teachers to self-reflect and experience meaningful professional growth connected to practice (Smith & Strickland, 2001). While research suggests that book studies are a meaningful approach to professional development, this approach may not be commonly utilized in schools. For example, Commeyras and DeGroof (1998) examined questionnaire responses from 515 teachers (grades K-5) on the perspectives on professional development and pedagogical practices. The questionnaire items were related to interests, experiences, influences,
and beliefs on professional development. The results of this survey indicate that 64% of these teachers had never participated in a book club with other adults.

Scott, Cortina, and Carlisle (2012) studied the interactions of teachers throughout the school day and also found the discussions around professional texts are limited. The researchers analyzed the interactions of teachers with Reading First coaches by analyzing 94 completed coaching logs from 105 participating coaches. These logs recorded the types of interactions and time spent with teachers and students throughout the school day. Scott et al. (2012) found that coaches only spent 5% of time during one-to-one meetings with teachers discussing content related to book study or personal professional development. At grade-level meetings, these same literacy coaches reported only 10% of time was dedicated to book studies and teacher knowledge development. Scott, Cortina, and Carlisle (2012) suggest that if schools offered teachers book clubs as an approach to professional development their conversations could promote further interest in current research and professional literature. Both research studies (Commeyras & DeGroof, 1998; Scott et al., 2012) argue that if teachers were given further opportunities to interact in book studies or clubs with other adults there may be an increase in teachers reading of professional literature. These interactions and reflections can be dependent on book study facilitators to support and guide the group.

**Facilitating Book Clubs**

Research suggests the facilitator role is a key component of successful book clubs (Burbank, Kauchak, and Bates, 2010; Selway, 2003). In a study that examined facilitators in a book club consisting of adults, Smith and Galbraith (2011) found the book club was not only a forum for learning, but also a place to practice leadership skills not possible through traditional trainings. Book clubs can be used as a form of professional development with pre-service
teachers and novice teachers to engage in discussions related to educational practices (Burbank et al., 2010; Clark, 2001; O’Connell Rust, 2002).

Kooy (2006) examined teacher book clubs with novice secondary teachers over a two-year period. Six women volunteered to meet once a week, for a total of six weeks throughout the school year to discuss fictional texts related to schooling and teaching. The researchers observed the experiences of these women using three theoretical lenses: (1) narrative knowledge relational to teaching and learning; (2) language and learning in social contexts; and (3) book clubs as places and spaces for relational learning. The researchers collected data through interviews, literacy autobiographies, documentation of planning a book study session, transcriptions of a book study session, and reading logs. This qualitative study suggests that using a book club approach for novice teachers can create small communities that inform and support teacher knowledge and development. The teachers all acknowledged and connected to their peers’ narratives as support and encouragement for creating and transforming their knowledge. When organized around teaching and schooling, book clubs can provide a platform for educators to reflect and make sense of their profession.

In a different qualitative study, Burbank, Kauchak, and Bates (2010) found similar results with 24 secondary pre-service teacher candidates. This study compared the differences between pre-service teachers’ experiences and discussions in a book club with those of 12 practicing teachers from student teaching sites. The researchers collected data from an open-ended survey, and documented reflections and transcriptions from both book club discussions. The results indicated that both groups used book clubs as a tool to increase their professional learning and build a professional learning community. Unlike in Kooy’s study (2006), the participants in this study, in both groups, identified the value of instructor-facilitator book club formats. This
finding suggests that book clubs may need a designated individual or facilitator to help guide the groups’ conversations and reflections. Burbank, Kauchak, and Bates (2010) stated, “Without the direct facilitation provided by the instructor who used guiding questions and feedback opportunities, teachers felt that book club discussions tended to meander” (p. 66). The role of the facilitator in book clubs can be critical to some educators for moving the conversations and reflections of the whole group forward. It is important to understand the structures, resources, and types of support needed as a facilitator in this position.

To study the dynamics of a book club, teacher researcher Pelletier (1993) observed a teacher leading a book club and one participant in the book study. Pelletier’s (1993) goal was to uncover the role of the teacher leader and how that role contributed to the success of the book club. During interviews, the teacher described herself as more of a ‘facilitator’ than a ‘leader.’ Holding a certificate in administration, she taught sixth grade at the same elementary school for sixteen years. She also had previous experiences leading other professional development groups. Pelletier (1993) attributed the success of this book club to the facilitator, the environment of the discussions, the group members, and the book club schedule. This finding connects to Burbank, Kauchak, and Bates (2010) findings that the role of a book study facilitator is critical for reflective conversations of the group. Burbank and her colleagues (2010) identified similar findings regarding the role of the facilitator in a teacher-led book study, but did not address the content of the selected text and preparation that this teacher leader needed to facilitate group discussions. It is important to understand the planning and approaches of book study facilitators to guide group discussions. The background experiences of the facilitator and the content of the selected text may be contributing factors to the success of the book study discussions.
Building on this research, participant-observer Selway (2003) examined her experience as a facilitator of a professional development book club in her high school building. This book club met four times after school during the school year and consisted of 27 teachers. Selway provided a text set to the participating teachers and they selected books based on general consensus of the book study members. As the facilitator, she described her responsibilities as generating the discussions and making sure everyone was heard. In her conclusions, she recognized the how informal leadership roles, such as facilitating, help support teacher leaders’ professional growth by guiding the range of perspectives from within a school community.

While teachers and outside experts have led professional book studies, district administrators and superintendents have also taken part in this professional development. Kisch (2009) interviewed administrators and superintendents on different approaches they used for professional book studies. One administrator describes how school leaders first read together a selected text on generating professional learning communities. As a group, they formed a common language, models, and discussion points before implementing book studies in their schools. Kisch (2009) discovered many school leaders who facilitated book study discussions needed to seek outside experts to answers questions on specific topics. This study suggests support is needed for facilitators of book studies, but the author did not address methods for seeking support indicating a need for research on support for book study facilitators.

The research on professional book studies indicates that many participating teachers volunteered to attend their book studies (Pelletier, 1993; Selway, 2003). In other school contexts, these professional development hours are a requirement. Additionally, some book clubs offer teachers professional development credit (Selway, 2003). The choice of attendance, professional development credit, and the selection of text may impact the engagement and
discussion in a book study. The research on book study facilitators reveals the importance of this role in generating meaningful conversations and reflections. However, the preparation and resources for facilitating book study discussions are not clearly identified within the research (Pelletier, 1993; Selway, 2003).

Given this research review on professional development book clubs and facilitators, the next section focuses on a specific professional development book study. The participating teacher leaders in this dissertation study facilitated the ISA book study. Therefore, it is important to understand the research and theories related to this book study.

**The Interactive Strategies Approach**

The ISA emphasizes a comprehensive view of literacy development and instruction. The results of studies of the effects of this approach to instruction indicate a positive impact on primary grade students’ literacy achievement when implemented by classroom teachers, as well as in small-group and one-to-one instructional settings beyond the classroom (Scanlon et al., 2005; Scanlon et al., 2008; Vellutino, Scanlon, Sipay, Small, Pratt, & Chen, 1996).

The three longitudinal studies focusing on the impact of this instructional approach have demonstrated that teachers who have engaged in professional development related to the approach are successful in: (1) reducing the numbers of first grade students experiencing significant reading difficulty through one-on-one intervention (Scanlon et al., 2005; Vellutino et al., 1996); (2) reducing the number of kindergartners who are identified as being at-risk for early reading difficulty who ultimately demonstrate reading difficulties through small-group, twice weekly intervention (Scanlon et al., 2005, Scanlon et al., 2008); and (3) improving early literacy outcomes for kindergartners whose classroom teachers participated in ISA professional development (Scanlon et al., 2008).
The ISA focuses on enhancing teacher knowledge of early literacy development to enable teachers to more effectively support literacy development among young children, especially those who struggle with literacy acquisition. All three longitudinal studies included professional development workshops and on-going support for teachers. The ISA teachers’ manual, which was iteratively revised across the three longitudinal studies, was ultimately published as *Early Interventions for Reading Difficulties: The Interactive Strategies Approach* (EIRD; Scanlon et al., 2010). The goal of the EIRD text is to support teachers’ understanding of literacy development and instruction, so they can effectively plan and deliver literacy instruction that is responsive to their students’ current capabilities.

The ISA is grounded in multiple theories related to literacy learning, motivation, and social constructivism. An important goal of instruction using this approach involves helping children develop a self-teaching mechanism (Share, 1995). Share’s self-teaching hypothesis focuses on how readers build their sight vocabularies through effectively using knowledge of the alphabetic code, and, overtime, larger orthographic units, in combination with contextual information to determine the likely pronunciation of unfamiliar words encountered in context. Having well-developed sight vocabularies enables readers to devote most of their cognitive resources to meaning construction rather than word solving.

The ISA also encourages teachers to view their instruction as goal-oriented and intended to help their learners achieve identified goals (Scanlon et al., 2010). These goals include

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1 Please note the remainder of this paper will refer to the book *Early Interventions for Reading Difficulties: The Interactive Strategies Approach* (Scanlon, Anderson, & Sweeney, 2010) as the EIRD.
development of motivation to read and write, phonological and phonemic awareness, skill with the alphabetic code (letter names, letter sounds, understanding and application of the alphabetic principle and larger orthographic units), vocabulary and language, comprehension, and knowledge (Scanlon et al., 2010). In addition to these goals, the ISA focuses on developing readers’ word solving and word learning skills through explicit instruction in word identification strategies (to support development of a self-teaching mechanism). These word identification strategies include both code-based and meaning-based strategies which children are encouraged to use in interactive and confirmatory ways. Classroom teachers are encouraged to address these instructional goals in the context of activities primary classrooms engage in daily. The book addressed these contexts such as read aloud, shared reading, small-group supported reading, independent reading, writing, oral language, and instruction in foundational skills (such as phonics and phonological awareness and high-frequency word learning).

**Social Constructivism and Mediated Learning**

The ISA is connected to theories associated with social constructivism and mediated learning. Social constructivism (Vygotsky, 1978) examines the relationships between human mental processes in their cultural, historical, and institutional settings (Wertsch, 1991). This perspective suggests teachers, other adults, and capable peers are mediators of individuals’ learning (Gavelek & Raphael, 1996). Vygotsky (1978) described this as the “zone of proximal development” meaning the distance between the actual development level and the level of potential development. For example, this zone describes what an individual is able to do independently and what they can attain with the guidance of an expert other. Vygotsky (1978) suggested student learning as becoming internalized from what they learn from those around them such as the teacher/collaborator, which then becomes part of their identity. Warford (2011)
also suggests the zone of proximal development as proceeding from direct learning from an expert, to self-assistance, and then later from internalization to recurrence.

A key aspect of the ISA focuses on the responsibility of the teacher to know where to lead the learner. Scanlon et al. (2010) suggested a teacher using the ISA must be (a) “adept at evaluating children’s current level of competence and deciding what they are ready to learn next” and (b) “facile at modifying the demands of the task so that it suits the needs of each child” (p. 20). Some skills and abilities may be difficult for children to develop, so the ISA, in keeping with Vygotsky’s theory, emphasizes the importance of assistance or coaching from a skilled collaborator.

When examining teacher learning, Warford (2011) suggests there is also a zone of proximal development for teachers. For example, teacher candidates they may acquire strategic mediated assistance from capable others such as cooperating teachers or their professors (Warford, 2011). Scaffolding can also be applied to the role of the skilled collaborator in supporting learning. Wood, Bruner, and Ross (1976) describe scaffolding as the “process that enables a child or novice to solve a problem, carry out a task, or achieve a goal which would be beyond his unassisted efforts” (p. 90). Scaffolding suggests learning is an active process, where individuals build upon their current knowledge. Bruner (1996) also describes how knowledge is exchanged through mutual communities where the interactions of learning take place. In the context of this study, the scaffolding theory is applied to examine teacher leaders in their positions as capable others who strategically mediate the professional literacy learning of their school communities.
Adult Learning Theories

There are multiple theories of adult learning in educational research (Bruner, 1966; Knowles, 1988; Lave & Wenger 1991; Mezirow 1978; Ryan & Deci 2000; Schon, 1987; Wenger 1998). Adult learning theories are typically focused on particular areas of learning and can be grouped into separate or related categories. These categories include: (a) instrumental learning theories focusing on the individual experience (Bruner 1966); (b) humanistic theories promoting individual development that is learner-centered (Knowles, 1988); (c) transformative learning theories explore how critical reflection influences the learners’ beliefs and social theories of learning (Lave & Wenger, 1991; Mezirow, 2000); (d) motivational models exploring intrinsic reasons for learning (Ryan & Deci 2000), and (e) reflective models that consider how reflection leads to action and then change (Schon, 1987).

Knowles’ principles of adult learning. The adult learning theory applied to teacher leadership focuses on a humanistic theory and a constructivist approach to adult learning. Specifically, the strength of andragogy or facilitating adult learning is that adult learning principles can be applied to all learning situations (Knowles, Holton, & Swanson, 1998). Knowles et al. (2005) stated:

Care must be taken to avoid confusing core principles of the adult learning transaction with the goals and purposes for which the learning event is being conducted. They are conceptually distinct, though as a practical matter may overlap considerably. Critiques of andragogy point to missing elements that keep it from being a defining theory of the discipline of adult education (Davenport & Davenport, 1985; Grace, 1996; Hartree, 1984), not of adult learning (Knowles et al., 2005, p. 2).
A separate issue that Knowles et al. (2005) raised is the consideration of characteristic associated with the goals and purposes of learning. The application of these principles provides a better understanding of: “(a) the particular adult learners and their individual characteristics; (b) the characteristics of the subject matter; and (c) the characteristics within the particular situation in which adults are learning” (Knowles’ et al., 2005, pg. 157).

Initially, Knowles (1970) discussed how adults learn in different ways than children. He used the term “andragogy” to differentiate adult learning from the pedagogy of helping children learn. Knowles (1980) then developed four core principles focused on understanding how adults approach learning. These four included (1) adults have the need to know why they are learning something, (2) adults learn through doing, (3) adult are problem-solvers, and (4) adults learn best when the subject is of immediate use. Knowles' (1980) described the principles of andragogy as important “assumptions about adult learners” (Knowles, 1980, p. 43). This model of assumptions differs from the traditional assumption about children learning and centers on only adult learning.

Although published as a learning theory, Knowles' (1980) rethinking of the principles as assumptions led to criticism from researchers (Durning & Artino 2011; Hartee, 1984, Merriman, 2001). The criticism mainly focused on Knowles’ principles as being more of descriptors or standards of good practices, rather than a theory (Merriman, 2001). Hartree (1984) stated that Knowles needed to clarify whether or not principles were a set of assumptions about learning or model of teaching, rather than a theory. Knowles also faced much criticism due to the exclusion of context and social factors, which are needed when constructing meaning and knowledge (Durning & Artino 2001; Merriman, 2001). Knowles’ et al. (1998) responded to the criticism by arguing the adult learning principles or assumptions provide more of a framework than a theory.
to shape learning experiences of adults and provide a foundation for planning adult learning experiences.

Currently, there are six core principles of adult learning referenced in the sixth edition of *The Adult Learner* (Knowles et al. 2005). This edition chooses to include the surrounded context of individual and situational differences, along with the goals and purpose of learning. Figure 1 lists each of these six principles with the associated definitions.

<table>
<thead>
<tr>
<th></th>
<th>1. Learners’ need to know</th>
<th>Adults need to know why they need to learn something before learning it.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Self-concept of the learner</td>
<td>The self-concept of adults is heavily dependent upon a move toward self-direction.</td>
</tr>
<tr>
<td></td>
<td>3. Prior experience of the learner</td>
<td>Prior experiences of the learner provide a rich resource for learning.</td>
</tr>
<tr>
<td></td>
<td>4. Readiness to learn</td>
<td>Adults typically become ready to learn when they experience a need to cope with a life situation or perform a task.</td>
</tr>
<tr>
<td></td>
<td>5. Orientation to learning</td>
<td>Adults orientation to learning is life-centered; education is a process of developing increased competency levels to achieve their full potential</td>
</tr>
<tr>
<td></td>
<td>6. Motivation to learn</td>
<td>The motivation for adult learners is internal rather than external.</td>
</tr>
</tbody>
</table>

*Figure 1. Knowles’ et al. (2005) six principles of adult learning.*

The first principle, the learner’s need to know, assumes that before a learner can commit to understanding content they need to have an understanding of their purpose for learning (Knowles et al., 2005). The second principle addresses the learner’s self-concept or choice in learning. For example, adults would be more likely to apply new learning to practice when taking charge and designing their own learning (Knowles et al, 2005). The third principle is connected to the prior experience of the learner, and the fourth principle addresses their readiness or willingness to learn. The fifth principle addresses the orientation to learning, for example, applying adults newly constructed knowledge to solve a problem (Knowles, 1990). The last
principle assumes that motivation is needed to learn in order to improve and learn new practices (Knowles et al., 2005).

As Jarvis (1987) indicated, in Knowles’ early work, perhaps he did not have a comprehensive theory related to the concept of andragogy, but built the foundation for different adult learning theories. As a result, there have been multiple theories, models, and sets of principles that combine Knowles’ knowledge of learning (Merriam, 2008). For example, Smith (1985) developed six different characteristics focused on how learning is life-long, personal, involves change, involves experience, partly intuitive, and is part of human development (Swift & Kelly, 2010). Moran (2007) and Vella (2002) have both applied new principles connected to adult learning, which suggests that the theory of adult learning continues to evolve in the field. For example, Moran (2007) proposed a continuum of customized learning opportunities for literacy coaches consisting of eight principles. These principles described how the intensity and involvement of literacy coaches increases working with classroom teachers to facilitate learning. Vella (2002) also proposed twelve principles and practices related to adult learning. These twelve principles address how adults begin, maintain, and nurture dialogue with other teachers in order learn new knowledge and connect to life experiences.

Additionally, Swift and Kelly (2010) examined multiple adult learning theories and proposed that knowledge of these theories can enhance the professional learning of educators. According to Swift and Kelly (2010), “By incorporating various models of adult learning theory into professional development, schools and districts are more likely to provide effective, sustainable professional development for teachers” (p. 25). Therefore, it is important to apply the Knowles’ et al. (2015) foundational principles to further contribute to the literature on professional learning experiences that support adult learning.
Teacher Leaders as Learners and Facilitators

In conclusion, the findings from previous research indicate that a teacher leader is a position that changes in terms of requirements, skills, practices, and responsibilities (Darling-Hammond et al, 2009; Gibson, 2005; York-Barr & Duke, 2004). Researchers have found that school district administrators continue to invite teachers to step into leadership roles and provide learning opportunities for teachers within their area of expertise (Darling-Hammond & Sykes, 1999; Dole, 2004; Gallowy & Lesaux, 2014; Quatroche et al., 2001). Literacy coaches and literacy specialists have also been identified as specialized teacher leaders having extended knowledge with literacy-related instructional practices (Calo et al., 2015; IRA, 2010; Walpole & McKenna, 2013). A review of the research suggests one of the increasing roles of specialized literacy professionals in teacher leadership positions is facilitating different methods of professional development (e.g., professional learning communities and professional book studies) (Calo et al., 2015; Crowft et al., 2010; U.S. Department of Education, 2009). For example, in a survey of over 2,500 specialized literacy professionals, Bean et al. (2015) found that 89% indicated they had some responsibility for supporting teachers, serving as leaders, and working collaboratively with other adults. Yet, despite these responsibilities, many of these specialized teacher leaders felt unprepared to work with teachers or lead their learning in professional development opportunities.

While many studies suggest that teacher leadership impacts the professional learning of teachers and thereafter impacts student achievement (Camburn, 2010; Linder, 2011; Parise & Spillane, 2010), this literature review also reveals there is a need for research on the structures, resources, and types of support provided to teacher leaders as learners. Research has identified multiple models and designs of professional development related to literacy (Darling-Hammond
et al., 2009; Dillon et al., 2011; Linder, 2011), yet there is limited research on the support provided to teacher leaders as professional development facilitators.
CHAPTER 3

Methodology

I conducted a qualitative case study over a nine-month period to examine how one school navigated a teacher leadership and professional development grant initiative. This section presents the methodology including the research design, school context, participants, data sources, and data analysis. Three major research questions guided this dissertation:

1. Within the grant initiative, what were the evolving roles and responsibilities of teacher leaders?
2. When implementing the grant initiative, what structures and resources did the teacher leaders find most helpful as learners?
3. In what ways do teacher leaders in a primary (K-2) school facilitate teacher learning to support early literacy instruction?

Research Design

Case study methodology (Merriam, 1998; Stake, 2005; Yin, 2009) provides an in-depth exploration of the context and culture of this inquiry. Stake (2005) described this form of research as the study of cases within bounded systems. I investigated the experiences of one school community, Weston School District, engaging in a grant initiative focused on teacher leadership and professional development. In Weston School District, I observed three specialized literacy professionals recently identified as teacher leaders in formalized positions. Each leader engaged with administrators and the school community with the intent to more effectively facilitate the literacy learning of children and by enhancing the instructional practices of teachers.
Case study methodology has the potential to provide a window into the daily experiences, responsibilities, roles, and reflections of participants (Yin, 2009). To understand the teacher leaders’ experiences within this school community, data sources included: (a) transcripts of individual interviews with the three teacher leaders and their administrators; (b) transcripts of focus group interviews with teacher leaders and primary classroom teachers; (c) descriptive field notes of observations of teacher leaders preparing for and providing professional development; and (d) documents (e.g., schedules, newsletters, lesson plans). On-going data analysis began in the field and continued throughout the research period to address the research questions. All school and participant names are pseudonyms.

School Community Context

The participants in this study teach in Weston School District, a suburban school district, serving approximately 3,000 students in grades K-12. At the district level, the student population during the 2014-15 academic year included 92% Caucasian, 4% African American, 3% Asian or Native Hawaiian/other Pacific Islander, and 1% Hispanic or Latino students. Approximately 31% of the student population received free/reduced-price lunch. This district employed about 250 teachers, administrators, and instructional support staff. The district buildings included one primary school (Kindergarten-2nd grade), one intermediate school (3rd-5th grade), a middle school (6th-8th grade), and a high school (9th-12th grade). My study focused on Riverside Primary School, the primary (K-2) building serving over 600 students with nine sections at each grade level.

Influential Components of this Study

Weston School District simultaneously implemented two new initiatives during this study: (1) the Strengthening Teacher and Leader Effectiveness Grant (STLE-3) and (2) the
Interactive Strategies Approach (ISA) book study. This section describes these two influential components to contextualize the formal development of teacher leadership positions and professional development within this school community.

**Strengthening teacher and leader effectiveness grant.** The New York State Department of Education (NYSED) awarded Weston School District the *Strengthening Teacher and Leader Effectiveness Dissemination Grant (STLE).*[^2] Funded by the United States Department of Education’s *Race to the Top* initiative, the STLE program supported eligible districts and public charter schools to develop, implement and/or enhance a comprehensive, systematic approach to recruit, develop, and retain effective teachers and school leaders as part of their implementation of the mandated Annual Professional Performance Review (APPR) (U.S. Department of Education, 2014). This program offered individual grants to school districts, based on their eligibility, to support teacher leadership. The eligibility requirements pertained to both public and charter schools with at least 25% of the students from low-income families (NYSED, 2014).

The STLE initiative created the opportunity for school districts to apply for individual state funding. Administrators from Weston School District chose to write a proposal for the STLE-3 grant centered on teacher leadership to be implemented during the 2014-15 academic school year. These administrators collaboratively designed a plan to expand and improve the professional growth of teachers. The responsibilities for teacher leaders in the district included: (a) co-teaching and modeling lessons for colleagues using research-based teaching practices, (b)

[^2]: Please note the remainder of this paper will use the acronym (STLE) to reference the Strengthening Teacher Leader Effectiveness grant.
working on curriculum development and implementation of the Common Core Learning Standards (CCLS; New York State Department of Education, 2011), (c) contributing flipped classroom videos annually\(^3\), (d) serving as mentors to newer teachers or other faculty members who need support, (e) attending and/or providing Methods Survey Courses\(^4\), and (f) completing an additional 25 hours of professional development to increase their own skills. An excerpt of the STLE-3 grant with this information is located in Appendix A. The funding from the STLE grant also provided educators with a $1,000 stipend for educators who accepted teacher leadership positions for the school year.

In June of 2014, the participating administrators sent an e-mail invitation to approximately fifty teachers (K-12) inviting them to accept a formal teacher leadership position. District administrators selected teachers based on their diverse experiences, expertise in specific academic areas, and engagement with professional learning in the school community. The invited educators who were interested in the position attended an informational meeting led by administrators. Interested teachers who could not attend this meeting followed up privately with

\(^3\) A flipped classroom video is a teacher-created video demonstrating a specific skill or strategy to align with content being presenting within the classroom. For the participating teacher leaders, flipped videos consisted of modeling instructional practices related to the Interactive Strategies Approach for other teachers or parents to access.

\(^4\) Methods Survey Courses refer to specialized professional development courses the school district administrators offered teachers to participate in afterschool related to content and instructional practices designed by internal and external instructors.
administrators. This meeting focused on the specific responsibilities for teacher leaders during the 2014-15 school year. Of the fifty invited educators, thirteen declined the opportunity and twenty-seven accepted the formal position as teacher leader. Of the twenty-seven, the administrators selected three teacher leaders to become specialized literacy professionals involved in the implementation of the Interactive Strategies Approach book study at Riverside Primary School. All three teacher leaders agreed to participate in this study.

Interactive strategies approach book study. District administrators chose to use the STLE-3 funding to provide professional development opportunities for teachers. For the 2014-15 school year, administrators targeted improving early literacy instruction and intervention at Riverside Primary School. Weston School District chose to invest in a web-enhanced professional development, referred to as the Interactive Strategies Approach (ISA) book study.\footnote{Please note the remainder of this paper will refer to the Interactive Strategies Approach professional development as the ISA book study.}

The first two authors (Scanlon and Anderson) of the EIRD book designed and implemented the professional development. The ISA book study occurs in three phases: preparation of teacher leaders (Phase I), professional development at the building level (Phase II), and ongoing support for teachers to implement the approach (Phase III). This dissertation focuses on the experiences of three teacher leaders after they participated in Phase I and while they implemented Phase II of the ISA book study within their school community. The district and school administrators and the teachers who participated in Phase II are also a focus of this study.
**Phase I.** Participants attended a 32-hour (four-day), face-to-face workshop led Dr. Scanlon and Dr. Anderson\(^6\). The targeted audience for these sessions included: administrators, specialized literacy professionals, classroom teachers, and special education teachers. The ISA developers’ intended for these sessions to help teacher leaders to both learn about the ISA and learn about how to conduct the book study with their colleagues.

The workshop focused on discussions of the processes involved in early literacy learning, why some children experience difficulty with literacy acquisition, and how teachers can effectively plan and implement r instruction to help children overcome their early difficulties. During the workshop, participants engaged in analyzing children’s books and instructional videos, reading and reflecting on portions of the EIRD, and collaborating with peers on activities to prepare for facilitation of the ISA book study sessions. The ISA developers’ treated all participants as future facilitators to reinforce the intended purpose of their role in enhancing their school communities’ knowledge of early literacy instruction and intervention.

**Phase II.** This second phase of the ISA book study centered on the implementation process within school communities. Teacher leaders led this implementation by drawing on their knowledge, practices, and resources gained from their participation in the ISA workshop, along with the web-based resources and the facilitators’ guide. As participants implemented the ISA professional development in their own school buildings, the ISA developers suggested structuring the professional development as a web-enhanced book study. For example, teachers

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\(^6\) The first two authors of the EIRD who led the ISA workshop and developed the ISA book will be referred to as the ISA PD developers throughout the remainder of this paper.
read chapters from the EIRD and teacher leaders integrated online materials/resources to support their colleagues’ understanding of the content.

**Materials and resources.** To accompany the ISA book study, teacher leaders had access to materials and resources designed by the ISA developers’ including an informational website (Appendix B), a facilitators’ guide (Appendix C), and a participants’ resource booklet (Appendix D). A sample of each of these materials is located in the appendices. These materials and resources complement each chapter in the EIRD. Teacher leaders are given private usernames and passwords to access the website related to the content of the EIRD and ISA workshop. The website features recorded presentations by the ISA PD developers that include much of the content presented during Phase I, videos of teachers and children that illustrate the teaching practices described in the EIRD chapters/topics, printable materials/games/assessments for use with young students, a recorded presentation conveying information about research on the ISA, resources for parents, and printable supplementary resources.

The facilitators’ guide (Scanlon & Anderson, 2014) contains a structured layout of notes, discussion points, and additional resources for teacher leaders. The participating teachers in the ISA book study all receive a participants’ resource booklet (Anderson & Scanlon, 2014). This booklet aligns with the structure of the EIRD. Teachers can also record their reflections and notes in this booklet to further support their learning and ultimate implementation of the ISA in their classrooms. These materials and resources are further examined within this dissertation to understand the support teacher leaders seek when facilitating professional development.
Participants

District Selection

I selected Weston School District because of the district’s: (a) implementation of a new teacher leadership initiative; (b) formalization of new teacher leadership positions; and (c) focus on innovative professional development opportunities. I selected Riverside Primary School based on the school’s emphasis on: (a) specialized literacy professionals in formalized teacher leadership positions; (b) teacher leaders facilitating teacher learning through professional development; and (c) the school’s focus on one professional development initiative related to early literacy instruction (the ISA book study).

Key participants. The key participants in this study were three teacher leaders: Sara, Grace, and Lisa. Together, they participated in the 32-hour ISA workshop and engaged in the implementation of the ISA book study at Riverside Primary School. The following information describes the teacher leaders’ background experiences and new position under the STLE-3 grant.

Sara. After nine years as a classroom teacher, Sara became a reading teacher for an additional nine years in the same primary school. As a result of the STLE-3 grant, district administrators invited Sara to be formally recognized as a district teacher leader. The administrators also offered Sara the position as a primary literacy coach in addition to her teacher leadership position. For the 2014-15 school year, the district appointed Sara as a teacher leader (.5) reading teacher for kindergarten students and (.5) literacy coach.

Sara’s literacy coaching responsibilities included co-teaching, planning/modeling lessons, providing feedback and reflecting on lessons with teachers, and providing resources for teachers. In addition to the two .5 positions, Sara’s responsibilities also included facilitating the ISA book study.
study in her building, creating ten flipped classroom videos on literacy instruction, and attending district professional development to strengthen her leadership skills.

**Grace.** Grace was a teacher for sixteen years, with fourteen years at the intermediate school in Weston School District. Grace taught fifth grade for five years and then spent nine years as an intermediate reading teacher. District administrators also selected Grace to be recognized as a formal teacher leader and an intermediate literacy coach. Similar to Sara, Grace accepted the title as teacher leader with the additional position as the (.5) 3rd and 4th grade reading teacher and (.5) literacy coach for grades 3-5. Grace’s literacy coaching responsibilities for grades 3-5 at the intermediate building consisted of co-teaching, planning/modeling lessons, providing feedback, reflecting on lessons with teachers, and providing resources for teachers. As part of her teacher leadership position, Grace supported and facilitated the ISA book study at Riverside Primary School, led additional professional development sessions in the intermediate building, created ten flipped classroom videos on literacy instruction, and attended methods survey courses to strengthen her leadership skills.

**Lisa.** Lisa taught first-grade for fifteen years at Riverside Primary School. The district appointed Lisa as a full-time teacher leader and teacher on special assignment as a first-grade reading teacher. Lisa attended the ISA summer workshop and had an influential role in supporting the facilitation of the ISA book study at Riverside. Lisa’s leadership responsibilities included supporting the literacy coaches with facilitating the ISA book study in the primary building, creating four flipped classroom videos on literacy instruction, and attending methods survey courses to strengthen her professional learning. Figure 2 provides an overview of each teacher leader participant.
<table>
<thead>
<tr>
<th></th>
<th>Sara</th>
<th>Grace</th>
<th>Lisa</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position</strong></td>
<td>Split Position: (.5) Literacy Coach Grades K-2 &amp; (.5) Reading Teacher Kindergarten</td>
<td>Split Position: (.5) Literacy Coach Grades 3-5 &amp; (.5) Reading Teacher Grades 3-4</td>
<td>Full-time (1.0) Reading Teacher 1st grade</td>
</tr>
<tr>
<td><strong>School Building</strong></td>
<td>Riverside Primary (K-2)</td>
<td>Intermediate (3-5)</td>
<td>Riverside Primary (K-2)</td>
</tr>
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<td><strong>Classroom teacher experience</strong></td>
<td>Kindergarten Riverside (8 years)</td>
<td>5th grade Another district (2 years)</td>
<td>1st grade Riverside (15 years)</td>
</tr>
<tr>
<td></td>
<td>1st grade Riverside (1 year)</td>
<td>5th grade Weston School District (5 years)</td>
<td></td>
</tr>
<tr>
<td><strong>Reading teacher experience</strong></td>
<td>9 years Riverside Primary</td>
<td>9 years Weston School District</td>
<td>No previous experience</td>
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<td>Attended Summer ISA workshop</td>
<td>Attended Summer ISA workshop</td>
</tr>
<tr>
<td></td>
<td>Facilitate ISA book study</td>
<td>Facilitate ISA book study</td>
<td>Support facilitators as needed</td>
</tr>
<tr>
<td><strong>Required Flipped Videos</strong></td>
<td>10</td>
<td>10</td>
<td>4</td>
</tr>
</tbody>
</table>

*Figure 2.* Overview of participating teacher leaders.

**Administrators and classroom teachers.** Additional participants in this study represent the broader context of the school community within the STLE-3 grant. Specifically, I sought participation from three administrators, two at the district level and one at the building level. These administrators attended the ISA Summer 2014 workshop alongside the three teacher

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7 To support the anonymity of the three administrators in this study, I do not reference the specific title of their positions, but refer to all three as *district administrators.*
leaders and also wrote and supervised the STLE-3 grant, which involved selecting the teacher leaders.

Of the twenty-seven classroom teachers at Riverside eleven participated in focus groups. Throughout the 2014-15 school year, all of the Riverside Primary classroom teachers were required by district administrators to attend the ISA book study facilitated by Sara, Grace, and Lisa. The classroom teachers collaborated with the teacher leaders to implement the instructional practices related to the ISA into their classrooms. The focus groups from eleven of these classroom teachers captures their experiences with the teacher leaders and the ISA book study.

My Role within this Inquiry

As a former literacy specialist in a different school district, I worked with multiple teacher leaders and literacy coaches. I also planned and facilitated professional development in my school building and across the district. As a doctoral student, my assistantship included supporting the ISA PD with their research and professional development related to the Interactive Strategies Approach. I participated, observed, and supported the ISA providers during ISA workshops in both face-to-face and online contexts. I also worked with the ISA providers to update resources and materials. My presence at the ISA workshops and my interactions with the ISA providers helped to support my understanding of the content related to the ISA book study. My experiences working with the ISA providers helped me to understand the intended expectations for teacher leaders to facilitate the ISA book study.

I understood that the participants of my study might act differently due to my presence as a researcher in their school. Therefore, before the study started, I met with the administrators and teacher leaders to discuss and frame my role. I informed the participants of my background
experience and relationship with the ISA providers. I then articulated that my role in the district would be a researcher, not a consultant. Therefore, I would not respond to any of their questions regarding the ISA and re-directed them to contact the ISA providers. My personal perspectives and experiences influenced the data collection (Patton, 2002). As an observer, I listened and spoke with participants to deepen my understanding of their experiences with the STLE-3 grant and the ISA book study. This role helped me to capture the daily roles and responsibilities of the three teacher leaders, including their planning and implementation of the ISA book study.

**Overview of Data Collection**

Data collection took place from October 2014 to June 2015. My collection included (a) observations and descriptive field notes (e.g., ISA book study, teacher leadership professional development, and planning meetings); (b) individual interviews with three teacher leaders and three administrators; (c) focus group meetings and transcriptions with primary teachers and the three teacher leaders; and (d) public documents (e.g. excerpt of the district grant). Appendix E provides a data collection timeline.

**Data Sources**

**Observations.** During the research period, I observed various activities the teacher leaders engaged in at Weston School District to better understand their experiences. This study included 73 hours of observations which is documented in appendices F-J. Patton (2002) stated, “The purpose of observational analysis is to take the reader into the setting that was observed. This means that observational data must have depth and detail” (p. 23). The observations helped to inform my research questions by illustrating the daily experiences of the selected participants within the context of their school community.
I observed with the intent of trying to understand conceptualizations and contextual factors of teacher leaders’ roles and responsibilities. To document these observations, I audio recorded each session using a digital device and wrote descriptive field notes to detail the interactions of all participants. These descriptive field notes detailed the threads of conversations between participants. I also documented emerging themes in field notes to help support the data analysis (Bogdan & Biklen, 1992). The observations and field notes helped to inform the development of my research questions, future interview protocols, and my understandings of teacher leadership and facilitating professional development. In order to distinguish between the events observed, I categorized each observation into separate themes (see data analysis section for further details). These themes include observations of teacher leaders facilitating, planning, meeting, participating, and engaging in district activities. A detailed description of these events, including the teacher leaders’ roles and responsibilities associated with each event, is located in chapter five.

Facilitating professional development. I observed the teacher leaders facilitating seven professional development sessions (15.5 hours) in Weston School District. These observations included five separate meetings at Riverside Primary School to observe the teacher leaders facilitating the ISA book study (9.5 hours) in the school cafeteria with all of the K-2 classroom teachers in attendance. At least one district administrator attended each session. In addition to Riverside Primary, I also observed Sara and Grace on two separate occasions (6 hours) facilitating a professional development session at the intermediate building. This professional development for special education teachers in the intermediate grade levels and their teaching assistants focused on integrating the ISA content into their instruction. Appendix F details the frequency, focus, and attendance of teacher leaders facilitating professional development.
Planning for professional development. I observed nine meetings (21.5 hours) where Sara and Grace planned professional development. The teacher leader on special assignment, Lisa, attended two of these planning meetings. I observed these meetings at Riverside in Sara’s classroom and at the intermediate school in Grace’s classroom. The focus of the planning meetings centered on the facilitation of the ISA book study at Riverside Primary and integration of the ISA content into special education classrooms in the intermediate building. Appendix G details the frequency and resources teacher leaders used at each planning meeting.

Meeting with district administrators. I also observed nine separate meetings with the teacher leaders and district administrators (14 hours). These meetings are in addition to the planning meetings with teacher leaders only. During these nine meetings, the teacher leaders and district administrators discussed the implementation of the ISA in Weston School District. These meetings were located in the administrators’ offices at both Riverside Primary and the intermediate building during the school day. Appendix H details the frequency and attendance of administrators to support teacher leaders.

Participating in professional development. Sara, Grace, and Lisa also attended professional development for teacher leaders designed by the Weston School District administrators. District administrators required all teacher leaders in formalized positions throughout Weston School District to attend this professional development. These professional development sessions supported teacher leadership and enhanced their leadership skills. The teacher leaders met in a technology center located in the high school. At every session, at least two district administrators were present as well as external speakers invited by district administrators. I observed all four sessions of the teacher leadership professional development
from October of 2014 until June 2015 (16.5 hours). Appendix I details the frequency and attendance of the teacher leaders participating in professional development.

Engaging in special district events. Sara, Grace, and Lisa also engaged in multiple school related events throughout the Weston School District. I attended and observed six after school events. (8.5 hours) from October 2014 through June 2015. At these events, the teacher leaders: (a) spoke at a mentor meeting for untenured teachers; (b) presented at the Board of Education about student outcomes in kindergarten; (c) spoke at a curriculum meeting; (d) ran a booth at the district family fun fair; (e) presented at the Board of Education about the implementation of the ISA book study; and (f) attended the district reading department meeting. Appendix J details the frequency, focus, and attendance of teacher leaders engaging in these special district events.

Documents. I collected documents at these observational events. The purpose of obtaining documents was to capture a range of information and teaching tools, and to illustrate information being described during my interviews and observations. The documents highlight Sara, Grace, and Lisa’s experiences as teacher leaders (Patton, 2002). These documents included: (a) Sara, Grace, and Lisa’s individual teaching schedules (Figures 4, 5, and 6); (b) Riverside newsletter (Figure 8); (c) presentation slide created by the teacher leaders (Figure 16); and (d) Grace’s notes in the ISA participants’ resource booklet (Appendix K).

Interviews. In addition to observations and collecting documents, I also conducted individual interviews to better understand the teacher leaders in this study. Seidman (2006) asserted, “Interviewing provides access to the context of people’s behaviors and thereby provides a way for researchers to understand the meaning of that behavior” (p. 10). I conducted individual interviews from April to June 2015 (Appendix L) with two district level
administrators (Appendix M), one building level administrator (Appendix N), and the three teacher leaders (Appendix O). The interview protocols are located in appendices L-N. Interviews focused on three separate topics to highlight the participants’ experiences and place them within the context being studied (Seidman, 2006). These topics included: (1) the participants experience and background, (2) details on their current experience within this context, and (3) reflections on the meaning of their experience. I audio recorded and transcribed each individual interview.

**Focus groups.** I conducted focus-group interviews with classroom teachers at Riverside Primary. A focus group enables participants to interact and expand on a shared experience (Patton, 2002). Emphasis on the word “focus” signifies that the researcher can collect data from multiple individuals simultaneously around a particular topic (Wilkinson, 2004). To recruit focus group participants, I distributed an approved questionnaire at Riverside to K-2 classroom teachers who participated in the ISA book study. I designed this questionnaire to acquire demographic data on potential participants’ teaching experience and for ask their consent to be in a focus group (Appendix P). The questionnaire also assisted with the organization of grouping members into focus groups based on their current positions.

During five focus group conversations in June of 2015 classroom teachers collectively discussed and reflected on their experiences. The interview questions focused on the classroom teachers’ engagement with the teacher leaders (Appendix Q). These groups included 11 teachers from grades K-2. Each focus group consisted of two or three teachers within the same grade level to provide a common experience. Two of the classroom teachers who chose to participate in the focus groups also held formalized teacher leader positions in the district.
Data Analysis

Data analysis followed a grounded theory design (Glaser & Strauss, 1967; Strauss & Corbin, 2008; Bogdan & Biklen, 1992) meant to illuminate themes as they emerged from the collected data. In a grounded theory study, researchers first begin with a particular area of study and relevant information and theories emerge when collecting and analyzing data (Charmaz, 2006; Glaser & Strauss, 1967). Grounded theory requires researchers to reflect on all sources of data searching for categories to emerge from the data (Miles and Huberman, 1994; Patton, 2002). I looked across all of my data sources to separate the individual and collective experiences of Sara, Grace, and Lisa. I then used an open-coding method (Strauss & Corbin, 2008) to identify patterns related to their individual and collective experiences. The patterns I identified included topics related to their positions as teacher leaders, the ISA book study, teacher leadership professional development, and interacting with the administrators and classroom teachers. I then collapsed these patterns found within my open-coding into conceptual themes. These themes included their roles and responsibilities, support systems, and approaches to facilitating professional learning. These themes helped to categorize data from multiple sources. Finally, I aligned these themes to the three research questions examining the roles and responsibilities of teacher leaders, resources and support for teacher leaders, and teacher leaders facilitating teacher learning.

To analyze the multiple sources of data, I used triangulation of qualitative data sources to check for any inconsistencies (Patton, 2002). Triangulating data sources allowed for cross-checking from these large quantities of data collected at different times and by different means such as observations, audio transcriptions of interviews, and documents. The process of cross-checking contributed to the verification and validation of what individuals say over time,
individually or with others, and the differences in perspectives and perceptions of a shared experience (Patton, 2002). Examination of this data provided opportunities to study and understand when and why differences in the data occurred to inform my research questions.

**Analyzing Observations**

I conducted a total of 35 on-going observations throughout the research period. Once I completed an observation, I would log the date, time, attendance, and focus of each event (Appendices F-J). I also transcribed the audio recorded observations to capture the conversations from participants (three teacher leaders, three district administrators, and the classroom teachers at Riverside). I continuously referred to descriptive field notes during each observation. These field notes helped capture any activities that could not be audio recorded and informed my transcriptions. Additionally, I conducted member checks with all participants to ensure accuracy of my observations. I shared transcripts and notes with my participants individually to confirm the representation of their conversations and experiences. The member checking focused on the agenda, conversations, interactions, and materials at each observational event.

I continuously referenced my observational log, field notes, and transcriptions throughout the research period. I developed common themes when reflecting on the frequency of events, activities that occurred at these observations, and roles of teacher leaders. For example, a common theme of these observations included teacher leaders engaging in professional development. I categorized these themes to distinguish roles which included: provider of professional development, curriculum developer, co-teacher, and communicator. Once I determined the teacher leaders’ roles, I then examined the observational data closely to identify activities that occurred at each event associated with that role. For example, each time Sara and Grace met to plan the ISA book study could be categorized under the role of professional
Teacher leaders had multiple responsibilities associated with their role of professional development provider. I needed to examine each observation related to my coding of professional development and categorize the multiple responsibilities associated with that role based on the data. I identified five categories to capture the responsibilities of teacher leaders related to their role of professional development provider. These included: (1) planning, (2) facilitating professional development; (3) meeting with district administrators; (4) participating in professional development initiatives; (5) and engaging in special district events.

**Analyzing Documents**

The documents collected throughout the research period served as a historical timeline on the development of teacher leaders roles and responsibilities. I collected documents at each observational event to inform my understanding of teacher leaders’ responsibilities and experiences. I categorized these documents based on their genre (e.g. school newsletters, schedules, Google Slides, ISA facilitator guide notes, and handouts). I analyzed each genre separately to determine any commonalities or differences. For example, I compared the schedules of Sara, Grace, and Lisa. I also continuously collected the school newsletters at Riverside featuring an article written by Sara. I noticed that the structure of her article changed as the year progressed. I then cross-checked my descriptive field notes of observations to draw on conversations or events that may have created a shift in the newsletter. The analysis of these documents captured the distinct differences and changes in roles and responsibilities of teacher leaders throughout the school year.
Analyzing Interviews

Following the on-going analysis of observations and documents, I also developed individual interview questions to reflect the influential components impacting the teacher leaders. I analyzed these interviews using Merriam’s (1998) recommendations for transcribing, highlighting key portions of data, and making comments in the margins connecting the information to the research questions. Then I organized these relevant excerpts to search for connecting threads and patterns (Seidman, 2006). After re-reading these interviews, I coded and highlighted the data based on the participants’ responses to interview questions and how their responses informed the research questions. Some of the broad categories that initially emerged from the data were: (a) understandings of teacher leadership, (b) supporting, and (c) facilitating. I reflected on these broader categories to locate specific language and events within this data (transcripts, observations, and field notes) to refine and develop specific codes. Ultimately, the following codes were developed based on these data sources and informed my analysis: (1) roles and responsibilities of teacher leaders; (2) support systems for teacher leaders; and (3) teacher leaders as facilitators. I carefully read through the transcripts of interviews with the three teacher leaders, administrators, and focus groups to label information with specific codes to represent the relationships and experiences of teacher leaders with the district administrators and classroom teachers. Figure 3 outlines and defines these codes.
<table>
<thead>
<tr>
<th>Codes</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles and responsibilities of teacher leaders</td>
<td>Selection process, definition, roles, responsibilities, support, and roll out</td>
</tr>
<tr>
<td>Support systems for teacher leaders</td>
<td>Resources and structures (teacher leader as a learner)</td>
</tr>
<tr>
<td>Teacher leaders as facilitators</td>
<td>Approaches used to facilitate professional learning</td>
</tr>
</tbody>
</table>

*Figure 3. Codes from interview analysis*

**Reliability and Validity**

For reliability and validity, I focused on how I collected, analyzed, and interpreted data as well as the manner in which I presented the findings (Merriam, 1998). Following Patton’s (2002) and Merriam’s (1998) recommendations, I sought reliability by collecting data from multiple sources to check for consistency of the participants’ experiences and provide an accurate representation of the school community. This data collection included individual interviews, focus groups, field notes of observations, and site documents. I triangulated all data sources to check for reliability and validity. For example, I cross-checked responses from teacher leaders to see if they aligned with responses from the district administrators and classroom teachers.

As the researcher, I recognize there will be biases while collecting, analyzing, and interpreting the data. Throughout this study, I maintained open communication with all participants through conversations and emails with the teacher leaders to answer questions, clarify procedures, and check my developing understandings to ensure accuracy and validity of the data. I also conducted member-checks to clarify interviews, answer questions, and asked for feedback on my interpretations of the data from the study participants.
Summary

As I described in this chapter, I focused on a nine-month case study of one primary school building with specialized literacy professionals in new teacher leadership positions engaging in early literacy professional development under a district-based grant initiative. I used the following multiple data sources to inform the research questions (a) interviews (with three teacher leaders and administrators); (b) focus groups (with primary classroom teachers); (c) observations and descriptive field notes (of teacher leaders engaging in professional development); and (d) documents (resources and materials teacher leaders used). I analyzed all data sources to determine common themes/patterns and create codes to help to organize the different experiences of each teacher leader to better understand the complex nature of their positions. To capture a clear representation of their positions I cross-checked interviews with my participants to the observations and collected documents. As I reflected on my analysis, I determined a need provide a chapter that details a portrait of this one school community. The following chapter provides the foundation to support the context of each research question.
CHAPTER 4

Weston School District Implements the ISA Book Study

As part of New York’s implementation of the Annual Professional Performance Review (APPR), school districts across the state focused their attention on enhancing the professional learning of practicing teachers (NYSED, 2014). Many districts developed local professional development opportunities or sought state initiatives and grants to fund the professional growth of teachers. Among these options, Weston School District applied for a state grant initiative focused on increasing and supporting the development of teacher leaders.

Grant Opportunity for Weston School District

In 2014, The New York State Department of Education (NYSED) awarded Weston School District the Strengthening Teacher and Leader Effectiveness Dissemination Grant (STLE-3). The NYSED website states, “These funds helped Local Educational Agencies (LEAs) take a comprehensive systems approach to prepare, recruit, develop, retain and provide equitable access to the most effective teachers and principals as part of their implementation of the Annual Professional Performance Review (APPR) system” (NYSED, 2014; p. 1)

Administrators from Weston School District used the STLE-3 funding to initiate new district and building teacher leadership positions, select new/additional resources, and provide professional learning experiences for teachers to increase student outcomes/achievement. A portion of the STLE-3 funding to Riverside, the primary (K-2) building, focused on enhancing early literacy instructional practices. The administrators chose to implement one professional development initiative for the 2014-15 school year at Riverside, the Interactive Strategies Approach (ISA) book study. This book study was framed around content from the text: *Early Interventions for Reading Difficulties: The Interactive Strategies Approach* (EIRD; Scanlon et
A description of the research and theories related to the ISA book study can be found in chapter two. The STLE-3 grant funded both Weston School District’s creation of leadership positions and its involvement with the ISA book study.

**Administrative Roles/Responsibilities for the STLE-3**

Weston School District administrators actively engaged in the ISA book study and with the teacher leaders. The administrators (two at the district level and one a building level leader) determined a need to allocate funding for teacher leadership and early literacy instruction and intervention. They chose to invite selected teachers from across the district to be recognized as teacher leaders. When teachers accepted the invitation to become teacher leaders, they attended professional development to support their growth as leaders. Administrators sat alongside teacher leaders to mentor and provide guidance while external speakers shared a range of instructional and leadership practices. These instructional and leadership practices included how to prepare and lead professional development to enhance the professional learning of their colleagues.

**Implementation of the ISA Book Study Under the STLE-3**

Initially, the administrators met with the researchers and developers of the ISA book study to determine how this professional development could support both the instructional needs of teachers and the individual learning needs of their students. The administrators, along with six teachers from Weston School District, then attended a four-day (32 hour) face-to-face workshop with the ISA PD at a local university (see chapter three for details). This workshop focused on building teachers’ knowledge of early literacy skills and instruction related to the ISA. Administrators and teachers learned alongside each other with the goal being to collaborate, communicate, and share a vision of implementing practices. Three of the six
teachers who attended the workshop are the focal participants of this study: Sara, Grace, and Lisa. The administrators selected these three teacher leaders to implement the ISA book study at Riverside Primary School.

The ISA book study, a three-phase professional development opportunity for primary teachers, is intended to build teachers’ knowledge of early literacy instruction and intervention. The content of this professional development is centered around the research, theories, and instructional practices discussed in the book *Early Interventions for Reading Difficulties: The Interactive Strategies Approach* (EIRD; Scanlon et al., 2010). As part of the Phase I face-to-face workshop led by the ISA PD developers at a local university, Weston teachers and administrators engaged in guided discussions aligned with the chapters from the EIRD. Each session emphasized congruence and coherence across instructional settings. They viewed instructional videos of teachers implementing the ISA in both whole-class, small-group, and one-on-one settings. The ISA PD developers guided participants to collaboratively reflect on their instructional practices to set goals for their own school community to foster student engagement, self-regulated learning, and responsive teaching. Participants learned about code- and meaning-based word identification strategies, comprehension and knowledge, vocabulary and language, as well as the importance of formative assessment to guide their instruction.

In this setting, teachers and administrators each received a participants’ resource booklet (see Appendix D) to take notes during each session which was organized in alignment with the content from the workshop and EIRD. All participants who attended the ISA workshop also received access to an accompanying website designed by the ISA developers’ (see Appendix B). The ISA website includes recorded videos featuring the ISA developers’ discussing separate topics addressed in EIRD, copies of handouts and tools provided at the ISA workshop sessions,
and an archived recording of the ISA workshop they attended. Additional resources supplied by the ISA developers consisted of a facilitators’ guide (see Appendix C). Further description of these materials can be found in chapter three and within the findings in chapter six.

**Teacher Leadership Positions Created Under the STLE-3**

During the 2014-15 school year, a total of 27 Weston School District teachers accepted the invitation from their administrators to be identified as teacher leaders for the purposes of the grant. The STLE-3 grant funded the creation of these new positions, stipends for the teacher leaders, and professional development opportunities.

The district administrators required all teacher leaders to attend professional development sessions scheduled and designed by district administrators to build their teacher leadership skills. The sessions included external speakers who focused on a range of topics such as facilitating professional development and utilizing technology to support professional development. Teacher leaders learned how to construct presentations for their colleagues such as designing presentations to engage their participants and developing questions to promote collaborative discussions. The district required all teacher leaders to create flipped classroom and/or instructional videos to support their colleagues’ instructional practices. External technology experts came to these professional development sessions and provided teachers with the guidance to design their videos. The district gave the teacher leaders iPads to create and edit their videos. The findings in chapter six further describe the resources district administrators provided to teacher leaders in these professional development sessions.

**Teacher Leaders Selected as ISA Book Study Facilitators**

In their new role as teacher leaders, the district administrators invited Sara, Grace, and Lisa to attend the ISA workshop and to support the implementation of the ISA book study at
Riverside Primary School during the 2014-15 school year. Each teacher brought a range of unique experiences to their new role as a teacher leader.

Sara began her teaching career as a classroom teacher for nine years and a reading teacher for an additional nine years at Riverside School. As a reading teacher, the district administrators offered Sara the position as a primary-level literacy coach in addition to her teacher leadership position. This resulted in the district appointing Sara as a teacher leader, (.5) reading teacher, and (.5) literacy coach for the 2014-15 school year.

In her position as a reading teacher, Sara taught kindergarten students across multiple classrooms. As a literacy coach Sara worked with the K-2 teachers. Sara’s literacy coaching responsibilities included co-teaching, planning/modeling lessons, providing feedback/reflecting on lessons with teachers, and providing resources for teachers. As part of Sara’s district-appointed position as a teacher leader her responsibilities also included: planning and facilitating the ISA book study in her building, creating ten flipped classroom videos on literacy instruction, and attending district professional development designed for teacher leaders to strengthen their leadership skills.

Grace had taught for sixteen years, fourteen years in Weston at the intermediate school. Grace taught fifth grade for five years and was an intermediate reading teacher for nine years. Like Sara, Grace also became a teacher leader, (.5) reading teacher, and (.5) literacy coach for the 2014-15 school year. As a reading teacher, Grace taught students in third and fourth grade. As a literacy coach, Grace worked with teachers and students in third through fifth grade. Grace also engaged in the same literacy coaching responsibilities as Sara (previously described). As part of her teacher leadership position Grace also planned for and facilitated the ISA book study at Riverside. To do this, Grace traveled from her intermediate building to Riverside Primary
School so that she could plan and lead this professional development. In addition, Grace continued to lead professional development sessions in the intermediate building on writing instruction and curriculum mapping. As did Sara, Grace also created ten flipped classroom videos on literacy instruction and attended the district’s teacher leader professional development to strengthen her professional learning.

Lisa was a first-grade teacher for fifteen years at Riverside supporting both students and teachers. For the 2014-2015 school year, Lisa was appointed as a teacher leader and teacher on special assignment as a reading teacher. Her responsibilities as a reading teacher included working with only the first-grade children. Unlike Sara and Grace, the district did not invite Lisa to become a literacy coach. However, Lisa did attend the ISA workshop and supported the facilitation of the ISA book study at Riverside. Her approaches to facilitating are further described in chapter seven. Some of Lisa’s leadership responsibilities included supporting the literacy coaches with facilitating the ISA book study, creating four flipped classroom videos on literacy instruction, and attending the district’s teacher leader professional development to strengthen her professional learning.

These teacher leaders facilitated the ISA book study at Riverside and also integrated their knowledge of ISA into their own instructional practices as reading teachers. This collaboration created common information to share with their colleagues regarding how the ISA could be implemented, with Sara, Grace, and Lisa drawing on their learning when they were implementing the ISA into their own reading groups.

**Planning and Facilitating Professional Learning**

Sara and Grace organized the ISA book study planning sessions held primarily at Riverside Primary School. During the research period, the participants started to individualize
the ISA book study to meet the needs of their school community. Their individual experiences of facilitating to meet the needs of the teachers at Riverside are addressed in Chapter 7. The building administrator attended some of these sessions to provide guidance and support as the teacher leaders navigated the intended schedule, content, and activities planned for the ISA book study sessions. During these planning sessions, Sara and Grace revisited content from their participation in the ISA workshop. They relied on specific resources created by the ISA PD providers to support their colleagues’ professional learning and their facilitation. They used the facilitators’ guide and also needed to view the instructional videos created by the ISA providers to plan their ISA book study sessions.

As Sara and Grace planned the ISA workshops, they discovered the suggested timeframe provided in the materials did not align with the district’s allocated time devoted to the ISA book study sessions. They identified needing a full day to provide the ISA book study content the way the ISA developers’ intended, but the district often gave them half days of professional development (see chapter five). As a result, Sara and Grace spent more time planning for the ISA book study sessions than providing the ISA book study sessions. Sara and Grace facilitated the ISA book study seven days during the 2014-15 school year. They spent 9 (21.5 hours) planning for these seven ISA book study sessions. As may be evident, Sara and Grace chose to spend extensive time focused on the planning process of the ISA book study sessions.

During the planning sessions, Sara and Grace navigated how to represent the intended vision of the ISA providers with the time given to them by their district administrators. Interviews and observations addressed in chapter five identify how much of their planning time was spent negotiating how to condense the content of the ISA book study. The ISA providers suggest timeframes that should be devoted to the content and activities associated with the
fourteen chapters in EIRD. For example, the ISA developers suggested about 45 minutes should be spent on the discussion time and activities associated with the chapter on letter naming and approximately one hour designated to for the chapter on letter-sound association. Sara and Grace needed to combine both of these topics in a one-hour session after-school. The findings in chapter five identify the strategic planning process they used in selecting what content to focus on in their allocated time frames.

As the lead facilitators of the ISA book study sessions, Sara and Grace also planned for how they would present the material. Initially, they spent a majority of their planning time reviewing resources they collected at the summer ISA workshop. In addition to using the ISA facilitators guide to plan for their facilitation of the ISA book study, they also re-read their own notes from their participants’ booklet to inform planning. They spent time accessing the website to view the pre-recorded videos of the ISA PD developers discussing specific topics connected to the ERID (Scanlon et al., 2010). They reflected on the facilitators guide and instructional videos to determine, which clips of the videos they could show in the allotted time provided for the ISA book study sessions at Riverside. As the school year progressed, Sara and Grace began to move away from just using the facilitators guide to creating their own outline of the ISA book study sessions using a shared Google Document. In chapter seven, the findings explore the collaborative tools they created to plan carefully based on their time constraints and the individual learning needs of the teachers at Riverside.

Sara, Grace, and Lisa each facilitated the ISA book study professional development sessions in different ways. Chapter seven examines each of their unique approaches. Sara and Grace led the whole-group book study sessions at Riverside, while Lisa led smaller break-out group sessions to discuss the content. Over time, each teacher leader developed specific
approaches to meet the needs of classroom teachers and foster teacher learning. For example, Lisa listened to her colleagues’ discussions during the break-out sessions and provided Sara and Grace with insight as to how the Riverside classroom teachers understood the ISA book study. Sara and Grace modified the presentations of the ISA book study sessions based on this feedback from the school community at Riverside. Sara and Grace also chose to create their own presentation slides to organize and condense the ISA book study sessions. They referred back to specific content covered during one of the district teacher leadership professional development sessions to support their development of these presentation slides. All three teacher leaders also discussed and modeled how they implemented the ISA in their reading groups during the ISA book study sessions to support teacher learning.

Sara, Grace, and Lisa engaged in district service activities in addition to their involvement with the ISA book study. Chapter five shows findings about their individual experiences, curriculum development meetings, Response to Intervention planning meetings, and presentation at district Board of Education meetings. At each of these sessions, they discussed their implementation of the ISA at Riverside.

Summary

This qualitative case study examined how specialized literacy professionals in formalized teacher leadership positions navigated professional development focused on early literacy instruction through a district initiative on teacher leadership. Presented in this study are the perspectives from (a) three specialized literacy professionals in teacher leadership positions: Sara, Grace, and Lisa; (b) district and building administrators; and (c) eleven K-2 classroom teachers.
The following chapters focus on the findings related to the three over-arching research questions:

1. Within the grant initiative, what were the evolving roles and responsibilities of teacher leaders?

2. When implementing the grant initiative, what structures and resources did the teacher leaders find most helpful as learners?

3. In what ways do teacher leaders in a primary (K-2) school facilitate teacher learning to support early literacy instruction?
CHAPTER 5

Evolving Roles and Responsibilities

The roles and responsibilities of specialized literacy professionals continue to evolve over time. For example, according to an International Literacy Association (ILA, 2015) research brief, literacy specialists are playing a larger role in engaging and mentoring teachers to support students’ literacy instruction. However, the ways in which specialized literacy professionals’ practices shift is dependent on school districts’ communication of their role(s) and responsibilities (Bean, Dole, Nelson, Belcastro, & Zigmond, 2015; Bean et al., 2015; Calo et al., 2015). This chapter answers research question one: *Within the grant initiative, what were the evolving roles and responsibilities of teacher leaders?* For the study, role(s) identify how teacher leaders supported the school community and responsibilities are the specific supporting duties associated with these role(s). Overall, data analysis showed four main roles: professional development provider, curriculum developer, co-teacher, and communicator.

The findings from this section identify the main roles of the teacher leaders followed by a description of their responsibilities within these roles. In order to capture the range of roles and responsibilities related to their positions, I analyzed data from teacher leaders’ experiences, as well as the perspectives from district administrators and K-2 classroom teachers, to identify the multiple roles and responsibilities the specialized literacy professionals engaged in as teacher leaders. Over the course of this study, I collected data from 35 observations of Sara, Grace, and Lisa. I analyzed the data to identify themes for both the roles of these teacher leaders and their responsibilities associated with these roles.
Role: Professional Development Provider

During the data analysis, professional development categories incorporated all instances when the teacher played a leadership role in the learning of others and/or enhancing their own learning. Within the professional development provider role, I developed categories to identify the multiple responsibilities of each participating teacher leader. These responsibilities of professional development providers included: (1) planning professional development, (2) facilitating professional development, (3) meeting with district administrators, (4) participating in professional development, and (5) engaging in special district events. Sara, Grace, and Lisa engaged in each of these responsibilities either collectively or individually throughout the research period.

To show how often teacher leaders engaged in the five categories, Table 1 presents a frequency count of teacher leaders’ engagement in their responsibilities as professional development providers. Table 1 captures all 35 observations, across three time periods, including the planning, facilitating, meeting, and participating sessions during the research time period. I did not observe all of the special district events in which the teacher leaders engaged, which might be a reason the number of is lower than the remaining observational events.
Table 1

<table>
<thead>
<tr>
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<tbody>
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<td>3</td>
<td>4</td>
<td>9</td>
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<tr>
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<td>3</td>
<td>7</td>
<td>15.5</td>
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<tr>
<td>Engaging in district events</td>
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<td>3</td>
<td>6</td>
<td>8.5</td>
</tr>
<tr>
<td>Total Observations/Hours</td>
<td>7</td>
<td>14</td>
<td>14</td>
<td>35</td>
<td>76</td>
</tr>
</tbody>
</table>

Of the five categories, planning was the most time-intensive responsibility. Across the research period, Sara, Grace, and Lisa spent extensive time planning (21.5 hours) for professional development sessions. Sara, Grace, and Lisa facilitated professional development sessions for 15.5 hours. Table 1 also shows the number of planning sessions equaled the same number of meetings with district administrators (9 sessions). The planning for the meetings included 7.5 additional hours. In addition to planning, Table 1 also indicates that while teacher leaders met the fewest number of times to participate in professional development, it was one of the most time-intensive responsibilities (16.5 hours). Overall, the teacher leaders met more with district administrators and spent more time planning and participating in professional development than facilitating. The following sections provide a detailed description of the teacher leaders’ five responsibilities related to the role of providing professional development.
Responsibility: Planning

Planning was the most frequent professional development responsibility for Sara, Grace, and Lisa in the implementation of the ISA in Weston School District. To identify the leadership activities associated with planning, I analyzed the context and process of each planning session along with interview data from each teacher leader.

The setting for the professional development planning meetings alternated between Sara’s classroom in Riverside Primary and Grace’s classroom in the intermediate building. Appendix G is a schedule of each meeting, including the location and time. Varying the location helped distribute travel time across the teacher leaders. Sara and Grace were present at every planning session. Lisa participated occasionally based on the discussion topic and meeting schedules.

Data analysis of interviews and teachers’ schedules indicated the teacher leaders believed their positions included responsibility for planning professional development; however, their schedules did not include daily joint planning times for all three teacher leaders. For example, Grace reflected on her position as both a literacy coach and reading teacher:

We made our schedules before the school year started, so I scheduled my reading and coaching time. Sara did the same thing, but her schedule was different because we’re at different schools. So then as we started to do the PD (ISA Book Study) and we both realized we needed to meet to plan for the PD, but sometimes our schedules didn’t work.

(interview 6, 4/17/2015)

Grace said that the teacher leaders did not have designated time to specifically plan for professional development during the school day. While the school district did provide Sara,
Grace, and Lisa with a daily planning time in the schedules, each teacher leader had a different planning time.

Sara, Grace, and Lisa’s schedules differed depending on their school and grade level(s). Grace’s position as a literacy coach and reading teacher aligned with Sara’s position, while Grace worked at the intermediate building. Figure 4 represents Grace’s teaching and coaching schedule during the research period.

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>8:20-8:50</td>
<td>8:30-9:00</td>
<td>8:20-8:50</td>
<td>8:30-9:00</td>
</tr>
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<td>3rd</td>
<td>coaching</td>
<td>3rd</td>
<td>coaching</td>
<td>3rd</td>
</tr>
<tr>
<td>9:00-9:30</td>
<td>9:00-9:30</td>
<td>9:00-9:30</td>
<td>9:00-9:30</td>
<td>9:00-9:30</td>
</tr>
<tr>
<td>3rd</td>
<td>coaching</td>
<td>3rd</td>
<td>coaching</td>
<td>3rd</td>
</tr>
<tr>
<td>4th</td>
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<td>4th</td>
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<td>4th</td>
</tr>
<tr>
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<td>10:10-10:40</td>
<td>10:10-10:40</td>
<td>10:10-10:40</td>
<td>10:10-10:40</td>
</tr>
<tr>
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<td>coaching</td>
<td>3rd</td>
<td>coaching</td>
<td>3rd</td>
</tr>
<tr>
<td>10:45-11:15</td>
<td>10:45-11:15</td>
<td>10:45-11:15</td>
<td>10:45-11:15</td>
<td>10:45-11:15</td>
</tr>
<tr>
<td>5th</td>
<td>coaching</td>
<td>5th</td>
<td>coaching</td>
<td>5th</td>
</tr>
<tr>
<td>11:20-12:00</td>
<td>11:30-12:00</td>
<td>11:30-12:00</td>
<td>11:30-12:00</td>
<td>11:20-12:00</td>
</tr>
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<td>planning</td>
<td>5th planning</td>
<td>5th planning</td>
<td>5th planning</td>
<td>5th planning</td>
</tr>
<tr>
<td>12:00-12:30</td>
<td>12:00-12:30</td>
<td>12:00-12:30</td>
<td>12:00-12:30</td>
<td>12:00-12:30</td>
</tr>
<tr>
<td>lunch</td>
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<td>lunch</td>
<td>lunch</td>
<td>lunch</td>
</tr>
<tr>
<td>12:30-1:00</td>
<td>12:45-1:00</td>
<td>12:30-1:00</td>
<td>12:30-1:00</td>
<td>12:30-1:00</td>
</tr>
<tr>
<td>coaching</td>
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<td>3rd</td>
<td>fluency group</td>
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</tr>
<tr>
<td>1:05-1:35</td>
<td>1:05-1:35</td>
<td>1:05-1:35</td>
<td>1:00-1:30</td>
<td>1:05-1:35</td>
</tr>
<tr>
<td>coaching</td>
<td>fluency group</td>
<td>5th</td>
<td>5th</td>
<td>coaching</td>
</tr>
<tr>
<td>1:40-2:10</td>
<td>1:30-2:10</td>
<td>1:40-2:10</td>
<td>1:30-2:10</td>
<td>1:40-2:10</td>
</tr>
<tr>
<td>coaching</td>
<td>planning</td>
<td>coaching</td>
<td>planning</td>
<td>coaching</td>
</tr>
<tr>
<td>4th</td>
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<td>4th</td>
<td>coaching</td>
<td>4th</td>
</tr>
</tbody>
</table>

Figure 4. Teacher leader schedule: Grace.

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8 Please note the classroom teachers’ names have been removed from the figures representing the teacher leaders’ schedules for anonymity.
Grace organized her schedule to include both coaching time to work with teachers and reading group time to teach students at the intermediate (grades 3-5) building. The time slot for personal planning time (40 minutes) varied each day. Similarly, Grace’s time period for coaching with teachers also changed daily, though typically involved the same amount of time each day. On a daily basis, Grace devoted approximately two hours to literacy coaching. Sara’s schedule at Riverside Primary provided a more consistent time for personal planning and coaching. Figure 5 represents Sara’s schedule throughout the research period.

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:20-8:40</td>
<td>Progress Monitoring</td>
<td>Progress Monitoring</td>
<td>Progress Monitoring</td>
<td>Child Study Team Meeting</td>
<td>Progress Monitoring</td>
</tr>
<tr>
<td>8:45-9:15</td>
<td>Kindergarten 1</td>
<td>Kindergarten 2</td>
<td>Kindergarten 2</td>
<td>Kindergarten 2</td>
<td>Kindergarten 1</td>
</tr>
<tr>
<td>9:20-9:50</td>
<td>LLI</td>
<td>LLI</td>
<td>LLI</td>
<td>LLI</td>
<td>LLI</td>
</tr>
<tr>
<td>9:55-10:25</td>
<td>Kindergarten 3</td>
<td>Kindergarten 4</td>
<td>Kindergarten 3</td>
<td>Language Concepts</td>
<td>Kindergarten 4</td>
</tr>
<tr>
<td>10:30-11:00</td>
<td>Coaching</td>
<td>Kindergarten 5</td>
<td>Coaching</td>
<td>Kindergarten 5</td>
<td>Coaching</td>
</tr>
<tr>
<td>11:00-11:30</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
</tr>
<tr>
<td>11:30-12:10</td>
<td>Planning</td>
<td>Planning</td>
<td>Planning</td>
<td>Planning</td>
<td>Planning</td>
</tr>
<tr>
<td>12:10-2:00</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
</tr>
<tr>
<td>2:05-2:35</td>
<td>Combo Group</td>
<td>ESL</td>
<td>Combo Group</td>
<td>Combo Group</td>
<td>ESL</td>
</tr>
<tr>
<td>2:35-3:00</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
<td>Coaching</td>
</tr>
</tbody>
</table>

Figure 5. Teaching leader schedule: Sara.

Sara had a dedicated time slot across the week for coaching and planning. Sara’s coaching times were between 12:10-2:00 and 2:35-3:00. This schedule provided her with 2 hours and 45 minutes of coaching time and 30 minutes of personal planning time. Sara and Grace’s schedules indicate a common coaching and planning time on Monday, Wednesday, and Friday each week. In order to plan for professional development Sara and Grace needed to coordinate their schedules based on their coaching time. Grace recalled how she worked with Sara to find
time in their schedules to plan for professional development: “Sara and I met about twice a month, sometimes more. We started to plan during our coaching time, so we wouldn’t cancel our reading groups. Sometimes we planned over the phone or Facetime. We just really needed to communicate and work together” (interview 6, 4/17/2015). Sara and Grace chose to use their coaching time to plan for the professional development. This scheduling format increased their opportunity to plan together, but at the same time conflicted with their working in classrooms with teachers.

As a first-grade teacher on special assignment, Lisa provided full-time reading intervention to the first-grade students at Riverside. Figure 6 represents Lisa’s weekly schedule during the research period. In addition, Lisa attended two planning meetings with Sara and Grace (see Appendix G). Lisa explained: “I didn’t meet that often to plan PD, because I was not the leader of the ISA book study and, to be honest, I didn’t have the time in my schedule to meet and plan” (interview 6, 4/17/15).
<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
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</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Planning</td>
<td>Planning</td>
<td>Planning</td>
<td>Child Study Team Meeting</td>
<td>Planning</td>
</tr>
<tr>
<td>9:00-9:30</td>
<td>Group 1</td>
<td>Group 2</td>
<td>Group 2</td>
<td>Group 2</td>
<td>Group 1</td>
</tr>
<tr>
<td>9:30-10:00</td>
<td>Group 3</td>
<td>Group 3</td>
<td>Group 3</td>
<td>Group 3</td>
<td>Sight Word Intervention</td>
</tr>
<tr>
<td>10:05-10:35</td>
<td>Group 4</td>
<td>Group 4</td>
<td>Group 4</td>
<td>Group 4</td>
<td>Sight Word Intervention</td>
</tr>
<tr>
<td>10:35-11:05</td>
<td>Group 5</td>
<td>Group 5</td>
<td>Group 5</td>
<td>Two-on-one intervention</td>
<td>Group 5</td>
</tr>
<tr>
<td>11:35-12:05</td>
<td>Group 7</td>
<td>Two-on-one intervention</td>
<td>Group 7</td>
<td>Group 1</td>
<td>Group 7</td>
</tr>
<tr>
<td>12:05-12:35</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
</tr>
<tr>
<td>12:35-1:05</td>
<td>Group 8</td>
<td>Group 8</td>
<td>Group 8</td>
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<td>Group 8</td>
</tr>
<tr>
<td>1:10-1:35</td>
<td>Group 9</td>
<td>Group 10</td>
<td>Group 9</td>
<td>Group 10</td>
<td>Group 9</td>
</tr>
<tr>
<td>1:35-2:05</td>
<td>Group 10</td>
<td>Group 9</td>
<td>Two-on-one intervention</td>
<td>Small group skill work assessment</td>
<td>Group 10</td>
</tr>
<tr>
<td>2:05-2:35</td>
<td>Small group skill work assessment</td>
<td>Small group skill work assessment</td>
<td>Small group skill work assessment</td>
<td>Small group skill work assessment</td>
<td>Small group skill work assessment</td>
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</tbody>
</table>

*Figure 6. Teacher leader schedule: Lisa.*

Lisa worked with first grade students in small reading groups across the school day. Opportunities to plan professional development would occur during her lunch (12:05-12:35) or during personal planning time in the early morning (8:30-9:00). Lisa’s position and schedule as a full-time reading teacher did not provide time for her to plan with Sara and Grace at the end of the day during their coaching time.

During the planning meetings, the teacher leaders used multiple tools such as the school laptop computers, iPads, and Google Drive. They chose to use Google Drive because the format provided a means for each teacher to access and comment on one planning document to increase their communication and collaboration. Figure 7 represents a sample of their planning document.
The teacher leaders used planning documents to plan together in the same space or in different locations to accommodate their schedules.

Figure 7. Sample of a teacher leaders’ planning document.

In addition to these tools, the teacher leaders continuously reflected on their experience from the ISA summer workshop. They referred back to notes they took during the workshop and conversations with the ISA book study providers. At all nine planning meetings, the teachers utilized resources created by the ISA providers including EIRD, the ISA facilitators’ guide (Appendix C), the ISA participants’ resource booklet (Appendix D), online instructional videos
from the ISA website (Appendix B), and videos of the ISA book study providers discussing the content aligned to the book. These resources are further described in Chapter 6 to capture how they supported the teacher leaders.

Initially, the teacher leaders designed their planning meetings to discuss and review the ISA facilitators’ guide. Sara reflected on these initial planning meetings: “Grace and I would just look back to our facilitator guide and re-watch the videos online (on the ISA website) to refresh ourselves” (interview 4, 4/17/15). As the ISA book study leaders for their school, the ISA providers gave the teacher leaders exclusive access to the facilitators’ guide. Appendix C shows how the guide is organized to align with the EIRD book and is structured with a similar format to a recommended lesson plan. During my observations, the teacher leaders discussed the online content and ISA facilitators’ guide to plan who would lead each topic at the ISA book study.

As the school year progressed, the teacher leaders discussed the dates and times district administrators scheduled the ISA book study at Riverside. The teacher leaders recognized that the district’s scheduled timeframe for the ISA book study did not align with the recommendations within the ISA facilitators’ guide. For example, the district scheduled one of the ISA book study sessions at Riverside for one hour (Appendix F; observation 3). The ISA providers recommend facilitating the book study topics for longer than one-hour sessions, such as the chapter on Phonological Awareness which is estimated for 2 hours and 25 minutes to 3 hours 30 minutes (see Appendix C). Sara explained that the majority of their planning time began to focus on condensing the content to fit the district timeframe. Sara commented: “We just couldn’t fit everything in. It was stressing us out. That is why we needed to spend more time planning because there was just so much content the teachers needed, but only so much time to do the PD” (interview 4, 4/17/2015). The teacher leaders started to shift away from following the
ISA facilitators’ guide explicitly to planning professional development that aligned with the district timeframe. As a consequence, the teacher leaders restructured and reorganized the content so it aligned with the specific dates and times scheduled by the district.

In addition to condensing the content into shorter periods of time, Sara and Grace also continuously contemplated ways to engage the school community with the content. Sara reflected:

We really wanted to make the book (EIRD) come alive and show real-life situations with modeling, because I know people remember examples like that better rather than if we were just to stand there and explain something. So, planning and preparation was also about gathering materials and, you know, making the packets and handouts for the building. (interview 4, 4/17/2015)

Sara explained how the planning meetings involved reflecting on what the classroom teachers needed. The teacher leaders strategically prepared copies of materials during planning sessions to create a meaningful experience for the school.

The observed times recorded in Table 1 indicated an increase in teacher leaders’ planning time to prepare for professional development. The teacher leaders facilitated professional development twice from October-December (2014), and met the same number of times to plan. Throughout the middle of the school year from January-March (2015), they facilitated two professional development sessions, and chose to increase their planning time to three separate sessions. Finally, at the end of the school year from April-June of 2015, they held four planning meetings and facilitated professional development three times. This data shows teacher leaders needed to meet one additional time for every time they facilitated professional development.
The increase in the teacher leaders’ planning time was due to the additional time they needed to work on refining specific approaches to facilitate teacher learning. For example, during one of the additional planning sessions (Appendix G; session 7) teacher leaders developed their own presentation slides for the ISA book study. This differed from the previous planning sessions where they directly followed the ISA website and ISA facilitators’ guide. The teacher leaders also worked on preparing a presentation for the School of Education Board Meeting at this planning sessions. This required the teacher leaders to increase their planning time, because they were working on ways to present the ISA material to the specific needs of the Weston School District community.

The additional six hours of planning meeting emerged as a result of a desire for more collaboration and to change the PD practices at Riverside. Grace explained this shift:

We started off meeting just to go over our notes and get on the same page. Then we wanted to meet and reflect on how it went and what we could do to improve the PD. Sara and I collaborated and started to get feedback from the teachers and Riverside. We started to think more about how the ISA fits in at Riverside and that led us to change things like the ISA Book Study. (interview 6, 4/17/2015)

Grace recognized that their planning helped them to reflect on ways to teach others about the research and theories of the ISA. She also addressed the importance of planning with Sara. Their discussions during planning meetings addressed a need to spend additional time attending and responding to the individual needs of the school community.

In summary, planning for professional development was a main responsibility of the teacher leaders in this study. During this planning time, teacher leaders reflected on how they needed to facilitate professional development based on the intended plan of the ISA book study.
and the needs of the teachers and students in Weston School District. Sara, Grace, and Lisa modified the delivery of content to account for both time constraints and the instructional needs of the teachers at Riverside. The teacher leaders recognized differences in their schedules sometimes interfered with opportunities to coach teachers and did not always permit time for everyone to plan together collaboratively during the school day.

**Responsibility: Facilitating Professional Development**

District administrators, the ISA providers, and school community members referred to Sara, Grace, and Lisa as teacher leaders and facilitators. During the research period, teacher leaders facilitated the ISA book study sessions seven times (15.5 hours). At each observation, Sara and Grace led the ISA book study as lead facilitators, while Lisa facilitated her colleagues’ learning by engaging with and leading many of the small-group discussions. An average of 35 teachers attended professional development sessions at Riverside, including all K-2 teachers and additional instructional support service personnel. In the intermediate building, an average of 12 teachers attended the sessions including all reading support teachers and special education teachers. In addition, district administrators attended sessions to observe and participate alongside teachers.

The facilitation of the ISA book study included whole-group discussions and smaller break-out group discussions with participating primary teachers and administrators. Facilitation involved discussions related to the topics addressed in the EIRD book and ISA web-enhanced materials and resources (Appendix B). Teacher leaders supported on-going and interactive learning through modeling instructional practices. Sara, Grace, and Lisa all facilitated the ISA book study using different approaches. A detailed description of their experiences and an
analysis of the ways teacher leaders facilitated teacher learning can be found in the findings related to research question three located in Chapter 7.

**Responsibility: Meeting with District Administrators**

District administrators continuously communicated with Sara, Grace, and Lisa throughout the implementation process of ISA book study at Riverside. On nine separate occasions (14 hours), the three teacher leaders met with the administrators to discuss the intended plan for each book study session. Each meeting started out with the teacher leaders sharing their informal plan for facilitating the ISA book study. District administrators discussed how teacher leaders could adjust their plan in order to spend more time on specific content areas related to the needs of the teacher and students at Riverside.

The meetings with administrators gave Sara, Grace, and Lisa the opportunity to share their planning process. A district administrator stated: “The meetings weren’t about holding them accountable for planning PD, but more to listen to their process and provide them with feedback to support and mentor them as leaders” (interview 3, 5/11/2015). Some of the topics observed at these meetings included: reflecting on their enhanced literacy positions, reviewing student data related to the implementation of the ISA, and documenting the impact of the STLE-3 grant.

In addition to attending, teacher leaders needed to prepare an outline of what they planned to facilitate at the ISA book study sessions for the administrator meetings. Sara explained how these meetings helped: “These meetings were great for me. It helped me to plan PD and everyone was on the same page. I felt important meeting with them (district administrators) and needed to really prepare so I could be professional” (interview 4, 4/17/2015). She described how the responsibility of attending these meetings increased her confidence as a teacher leader. She also valued the time spent conversing with her district leaders. Similarly, Lisa
affirmed how attending these meetings influenced her as a teacher leader stating: “The meetings with (district administrator) were so valuable. (District administrators) really listened and always gave a different way to think about things without telling us do it a certain way” (interview 5, 4/17/2015). Lisa also appreciated being informally mentored by her administrators at these meetings.

As the teacher leaders began to enact the grant, their schedules had to be rearranged to attend these meetings with district administrators. Grace reflected on the scheduling of these meetings stating: “I was at (the intermediate building) and these meetings were always at Riverside, so I had to cancel groups or my coaching time and travel to the school, but it was important for me to be there” (interview 6, 4/17/2015). Grace identified how the scheduled time of the meetings during the school day impacted her main responsibilities as a reading teacher and literacy coach, and also recognized the value of attending these meetings with district leaders.

In summary, the responsibility of teacher leaders attending meetings with district administrators influenced their identity and planning as teacher leaders. The meetings helped teacher leaders to build communication and collaboration with their district administrators. It also provided district leaders the opportunity to mentor teacher leaders.

**Responsibility: Participating in Professional Development Initiatives**

The administrators required all teacher leaders (27 total) to participate in four (16.5 hours) professional development sessions on teacher leadership during through the research period. Administrators scheduled the meetings usually for three hours either in the morning or afternoon during the school day. The STLE-3 grant provided the funding for substitutes so that all teacher leaders could attend. Sara, Grace, and Lisa all attended the meetings along with district administrators.
The meetings focused on strengthening the qualities of teacher leaders and enhancing their professional learning and skills. For example, at one meeting outside experts on technology showed how to create flipped classroom videos. In another meeting, a professor from a local university showed how to plan and provide professional development. The speakers provided professional development to all teacher leaders in the district and also supported teacher leaders with the process of facilitating in their own school buildings.

Sara, Grace, and Lisa usually sat together at these teacher leadership meetings and discussed how to integrate their new knowledge on facilitating professional development into the ISA book study sessions at Riverside. Lisa commented: “I learned so much from (local professor) about how to think about the way you make a PowerPoint slide for PD and those guys from (a local technology center) really helped me with making flipped videos” (interview 5, 4/17/2015). Lisa shared that these meetings increased her expertise and leadership skills. The teacher leadership meetings helped her to build a professional learning community and provided the opportunity for all teacher leaders to interact across the district and reflect on their experiences. All teacher leaders in the district used the provided time to engage with these resources and collaborate with each other to support their role as professional development facilitators.

**Responsibility: Engaging in Special District Events**

The teacher leaders also participated and presented at multiple events throughout Weston School District. These events included: (a) speaking at a mentor meeting for untenured teachers; (b) presenting at the Board of Education about student outcomes in kindergarten; (c) speaking at a curriculum meeting; (d) informing families about early literacy instruction at the district family
fun fair; (e) presenting at the Board of Education about the implementation of the ISA books study; and (f) attending their district reading department meeting.

The district administrators invited all the teacher leaders to participate in the after-school events. One of these events involved speaking at a mentor meeting for untenured teachers. Grace reflected: “We (Sara and Grace) were asked to come to one of the district mentor meetings and provide resources for untenured teachers related to literacy. We weren’t just going to show up and talk so Sara and I needed to meet and plan out what each of us would say, what resources we thought would be helpful” (interview 4, 4/17/15).

The Board of Education (BOE) meeting highlighted the importance of teacher leaders’ roles in the district. An administrator invited the teacher leaders to present to the School Board on two separate occasions. One presentation focused on student outcomes in kindergarten and the other meeting focused on the implementation of the ISA at Riverside. Sara reflected on presenting at this event stating:

It was such an honor to present at the BOE meeting, but it took a lot of time and we had like a couple weeks to get ready. We knew we were going to tell them about the ISA, but we really had to purposely plan to inform them about what the ISA is, and what we were doing, and what instruction of the ISA looked like. It was a lot! (interview 4, 4/17/2015)

Sara recognized the responsibilities associated with these special events required additional planning time, and also expressed how honored she felt presenting in front of the district’s Board of Education.

The Family Fun night was another example of additional responsibilities, in this case, engaging in district events. This event was held for two hours after school. District administrators requested that Sara and Grace attend the event and inform parents about early
literacy instruction and provide parents with materials/resources related to the ISA. Grace stated: “It was only a two-hour event, but we had to spend time meeting to go over what we wanted to give parents and create all the informational materials. We also wanted to provide some of the games and activities the ISA discusses to support early literacy at home. It took a lot of time, and because it was for the families so we wanted it done right” (interview 6, 4/17/2015). Grace identified how the responsibility of providing information on the ISA to families required the teacher leaders to plan differently. Since this was a different audience the teacher leaders needed to be mindful of how to extend the terminology and practices from school to home. This event also helped teacher leaders communicate with parents by informing them about early literacy practices and the relationship of their position as teacher leaders to the teachers and students at Riverside.

In summary, teacher leaders continued to engage as leaders through special district events. These opportunities expanded the range of skills teacher leaders needed to publicly present to families, community members, district leaders, and novice teachers. These opportunities supported growth as leaders and as professional development facilitators by presenting to multiple audiences in different contexts throughout the school-wide community.

Role: Curriculum Developer

The STLE-3 grant specified all recognized teacher leaders needed to develop and support curriculum that aligned with the Common Core Learning Standards (New York State Department of Education, 2011). As a result of implementing the ISA, district administrators recognized a need to reflect on and refine the primary and intermediate curriculum. An administrator stated: “The ISA instructional goals, language, and practices needed to be integrated into the curriculum to create consistency and congruency and to support continued
sustainability” (interview 3, 5/11/2015). Administrators recognized the need to include the theories and practices of the ISA within the district curriculum to support the implementation of the ISA at Riverside. Interviews with the three participants identified different experiences in their role as curriculum developer revealing planning and mapping associated with this role.

**Responsibility: Curriculum Planning**

The teacher leaders continuously reflected on and planned literacy curriculum throughout the school year. This responsibility involved working side-by-side with classroom teachers in grade-level meetings to discuss, plan, and reflect on literacy-related lessons. Specifically, the focus of these curriculum planning sessions centered on the integration of the ISA into teachers’ literacy lessons. The curriculum planning meeting occurred either during the school day or after school. Grace reflected on working with teachers to plan literacy curriculum: “I would meet with teachers during literacy coaching time or at their grade-level meetings, which happened after school, to talk about their literacy blocks” (interview 6, 4/17/2015). The literacy blocks Grace referred to involved a daily time period dedicated to literacy instruction. The teacher leaders often had the responsibility of attending grade-level meetings where all the teachers in the same grade level met to discuss their lessons. The teacher leaders often attended to discuss and plan literacy lessons with the classroom teachers.

The district administrators selected Sara to lead many of the curriculum planning meetings for the kindergarten teachers at Riverside. Sara reflected on her position as a teacher leader and her responsibility for curriculum planning:

I really get the opportunity to listen to the teachers and plan with them. We discuss what I’m doing in my reading groups with ISA and how they can incorporate those same approaches in their instruction. I always bring it back to ISA, because that is our focus
this year, and I keep the K (kindergarten) teachers back on track at these meetings with our school-wide goal. (interview 4, 4/17/2015)

Sara recognized how her position influenced the future of literacy practices in the school. She chose to become involved in multiple committees designed to support the district curriculum. A kindergarten teacher stated: “Sara is helping us to understand how we write the ISA goals in the kindergarten curriculum. She has a way of helping us to focus our attention on the key components” (focus group 1, 6/23/2015). The focus group teachers also acknowledged Sara’s expertise and valued her input. For example, they invited her into their classrooms to model ISA lessons and took time out of their planning to come and observe Sara’s reading groups to learn more about the ISA.

Similar to Sara, Lisa’s experience with teaching first grade also supported her curriculum planning with the teachers in first grade. Lisa reflected “…I really like to have the opportunity to provide feedback and to listen to what others are thinking and to think about the direction we are going in” (interview 5, 4/17/2015). Lisa shared her experience as a former first grade teacher with the classroom teachers during curriculum planning sessions. A first-grade teacher stated: “Lisa really understood what my students could do in first grade, because she was a first-grade teacher, so she helped me think about how to set up my literacy block and to incorporate the ISA in my lessons” (focus group 3, 6/25/15). This teacher recognized the importance of teacher leaders attending curriculum planning sessions to support the integration of the ISA into the classroom teachers’ literacy lessons. The responsibility of curriculum planning involved the teacher leaders contributing their knowledge of literacy instruction and the ISA to further support teachers with professional learning and literacy practices.
Responsibility: Curriculum Mapping

In addition to planning curriculum for Riverside, the teacher leaders had the responsibility of mapping out the literacy curriculum for Weston School District. Grace described her responsibility of curriculum mapping as follows:

I’ve taken a very large part in curriculum mapping this year, which wasn’t expected. I was asked to look at the curriculum maps across all three grade levels and provide feedback on my noticing’s and one of the things that I did notice is the lack of assessment, which was very interesting and then I was asked to look at the unit plans and note the content and provide feedback as well. (interview 6, 4/17/2015)

Grace described the responsibility of curriculum mapping as writing curriculum across multiple grade levels focused on literacy and developing assessment tools for these grade levels.

The teacher leaders often led curriculum mapping meetings to align the grade levels and guide conversations focused on literacy. Sara provided an example of this alignment. “At one of our mapping meetings we shared ideas about what the K-2 teachers should all use for literacy assessment and because they didn’t have one to provide data on phonological awareness and phonics, and we also we wanted to implement the ISA, so we decided to incorporate the PAWS (an assessment designed by the ISA developers)” (interview 4, 4/17/2015). Sara described how the curriculum mapping process involved discussing data and assessments, and how to implement the ISA into these district-wide decisions. This responsibility also enhanced teacher leaders’ roles as leaders within their district by giving them an active voice in creating a coherent district curriculum.
**Role: Co-teacher**

As co-teachers, Sara, Grace, and Lisa worked with classroom teachers and interactively demonstrated instructional practices that served as a model for classroom teachers. One definition of co-teaching is “two or more professionals delivering substantive instruction to a diverse, or blended, group of students in a single physical space” (Cook & Friend, 1995, p. 2). All three teacher leaders worked with the classroom teachers in Weston School District to deliver instruction that focused on the integration of the ISA. A classroom first grade teacher described the process of co-teaching with teacher leaders as: “We planned together and taught literacy lessons together; like I would do a read-aloud and we would share our thinking with the students about how we could use the ISA strategies to decode words” (focus group 3, 6/25/2015). This is one example of the teacher leaders working side-by-side with the classroom teacher to deliver instruction. The role of co-teaching helped to build relationships with the classroom teachers and provided an opportunity to model instructional language and practices related to the ISA.

As literacy coaches, Sara and Grace used their coaching time to integrate co-teaching and modeling into their weekly schedule. Lisa focused on co-teaching or modeling lessons in addition to taking her small reading groups for intervention. Lisa stated: “Our role as teacher leaders was to work with classroom teachers and to model instructional practices. I just felt like that was Sara and Grace’s job because they were the coaches, but I knew as teacher leaders we needed to do that too. I just didn’t know if I was overstepping them as coaches if I modeled for the first-grade teachers” (interview 5, 4/17/2015). Lisa said the position of literacy coaches and teacher leaders were not separated by distinct roles, because administrators expected both literacy coaches and teacher leaders to model and co-teach with classroom teachers. Classroom teachers also observed small reading groups to watch how to integrate the ISA into early literacy
instruction or observed the teacher leaders leading whole-group lessons focused on the ISA in their classrooms. Analysis of focus group interviews with classroom teachers and the individual interviews with Sara, Grace, and Lisa determined the major responsibilities associated with co-teaching: modeling in the classroom and modeling with technology.

**Responsibility: Modeling in the Classroom**

Sara, Grace, and Lisa all modeled lessons in their colleagues’ classrooms throughout the school year. This included demonstrating specific literacy lessons with the goal of supporting the implementation of the ISA. Through modeling lessons, the teacher leaders communicated with classroom teachers and began to build a trusting relationship to be invited into their classrooms. All three teacher leaders worked with separate grade levels in Weston School District.

As a reading teacher for kindergarten students, Sara focused her modeling on the kindergarten teachers at Riverside. As a K-2 literacy coach, Sara also pushed into 2nd grade classrooms to model instructional practices related to the ISA in 2nd grade. As a former first grade teacher at Riverside, Lisa worked directly with the 1st grade teachers to model instructional practice with 1st grade students in her reading groups. Since Grace worked at the intermediate school building she modeled lessons for teachers in grades 3-5.

The teacher leaders’ previous experiences working with these grade levels helped them to build relationships with classroom teachers. As these teacher leaders engaged in modeling in classrooms they also needed to schedule meetings with classroom teachers to reflect on the lessons that were modeled. Sara, Grace, and Lisa differed in their experiences of working with classroom teachers. For example, a first-grade teacher in the focus group commented:

I felt comfortable having Lisa in my room to model and co-teach lessons. She was a first-grade teacher for years, so I knew she understood what it was like to teach first grade. I
felt comfortable with her in my class and I learned a lot from her language and how she used the ISA in lessons. (focus group 3, 6/25/2015)

Lisa’s long-term experience as a first-grade teacher gave her the credibility to provide instructional guidance. She had already established trust among the first-grade team members and did not need to spend time building that relationship. Sara’s experience modeling for the second-grade teachers was quite different than Lisa’s experience. Sara reflected on her experience modeling with second-grade teachers: “As a reading teacher I only worked with kindergarten students, so it was a challenge to build a relationship with the second-grade teachers. They didn’t feel as comfortable inviting me into their classroom because I didn’t work with their students” (interview 4, 4/17/2015). Sara described how one of her responsibilities of modeling outside the classroom was communicating her position as literacy coach to classroom teachers. A classroom teacher discussed this communication process with teacher leaders:

I knew that Sara was a literacy coach and Lisa was a new reading teacher, but it wasn’t like I was just going to ask them to come in my room. I didn’t know their schedules and what they were expected to do to support me with ISA. I figured it was their job to make the first move and reach out. Once that happened I felt more comfortable inviting them into my class to model lesson and work with students on ISA lessons. (focus group 2, 6/25/2015)

Sara, Grace, and Lisa also invited their colleagues to view their reading intervention groups. Sara reflected on modeling lessons for teachers in her reading room: “I needed to reach out to a lot of teachers and initiate conversations about working together. It wasn’t like teachers asked me to come into their classroom. I had to build a relationship and almost tell them about my role as a literacy coach. What I could provide for them and help them with” (interview 4, 4/17/2015).
This focus group data aligns with Sara’s initial experience. Sara recognized that classroom teachers didn’t directly invite her into their classrooms and she needed to engage in conversations with them in order to model lessons. The classroom teachers also identified a need for a clearer description of Lisa and Sara’s role to support them with ISA lessons. Grace also described how she needed support with modeling:

I feel like there are some things that I missed the boat on. Not anything major but my de-briefing of modeling lessons and stuff. We weren’t really prepared as coaches to model lessons. I learned later about having a form for teachers when I am teaching a model lesson where they are writing things and making notations or writing questions that they would want to discuss. I feel like, if I would’ve started with that, I would’ve had a little bit better of an experience whereas some of my troubles were when I was teaching a model lesson is that people weren’t engaged or they would leave the room. (interview 6, 4/17/2015)

Grace affirmed that teacher leaders need preparation to support classroom teachers. She recognized that observational notes are essential when providing reflective feedback to teachers. Modeling in the classroom provided classroom teachers with authentic opportunities to see how the ISA could be implemented into instruction with the classroom teachers’ students. This responsibility also allowed the teacher leaders to engage in specific conversations related to the ISA, grade-level expectations, and individual student needs.

**Responsibility: Modeling with Technology**

The responsibility of modeling also involved teacher leaders creating remote opportunities to enhance the learning of others through technology. Sara, Grace, and Lisa all identified how the technology provided at the district teacher leadership meetings supported their
ability to model lessons for classroom teachers in the district. The teacher leaders used these technology resources to create flipped videos to demonstrate a specific skill or strategy to align with content being presented within the classroom. Lisa reflected on accessing technology and to model for teachers:

I was never a technology expert. I actually never used Vimeo or iMovie, but now my kids are impressed because I know how to use it. It was helpful for me to video my lessons, because I reflected all the time on them and what I would want other teachers to see. (interview 5, 4/17/2015)

Lisa’s confidence in using technology increased along with her confidence about sharing her teaching practices with others. Although the administrators did not require the videos to be focused on the ISA, they did stress the need for the teacher leaders to support classroom teachers with the implementation of the ISA. A district administrator described the purpose of these videos: “We want it to be sustained and I think the flipped classroom and video catalog would support the sustainment of this grant (STLE-3) and give teacher leaders a meaningful purpose of creating them” (interview 1, 6/17/2015). These videos of teacher leaders modeling lessons became part of the media library as a resource to support teachers, students, and parents.

Sara, Grace, and Lisa all created videos using the technology resources to model instructional practices, language, and tools related to the ISA for other teachers or parents to access. This responsibility included time to plan purposeful lessons, edit these lessons on software, and upload lessons to the district site.

**Role: Communicator**

To be responsive to their colleagues’ needs and enhance student learning, teacher leaders actively reached out to communicate with members of the school community. All three teacher
leaders used technology to communicate. Their responsibilities for communication included reaching out to classroom teachers, administrators, and families, and also communicating with each other. Sara, Grace, and Lisa used different approaches and tools to communicate with classroom teachers including school newsletters, e-mails, surveys, shared Google documents, and flipped videos. The following section describes their individual responsibilities as communicators.

**Responsibility: Communicating through School Newsletters**

Early in the school year, a district administrator suggested Sara and Grace should contribute to their building’s school newsletter. Through the weekly electronic newsletter, Sara and Grace communicated with their colleagues and parents. Sara and Grace wrote a section within the newsletter called the ‘ISA Share Spot.’ Grace described this section of the school newsletter as: “I get to quote the book or talk about an experience that I’ve had that relates to the PD that we did. It’s a way to reflect and provide questions to get teachers thinking more about the ISA” (interview 6, 4/17/2015). Their sections in the newsletter evolved throughout the school year based on information Sara and Grace learned about teachers. Figure 8 is a document of Riverside’s newsletter.
The newsletter showed how Sara and Grace strategically used positive language in the ISA Share Spot such as: “Thanks so much for your engagement in our presentation Monday.” They also provided teachers with a specific goal to use implement the games into their instruction. In addition to the ‘ISA Share Spot,’ Sara wrote a section called the Coaching Corner represented in Figure 8. This section highlighted successful interactions with other teachers through co-teaching and modeling. In the Coaching Corner, Sara listed the names of teachers she worked with in second grade as well as the instructional practices she observed, and offered her continued support to work in classrooms. Sara recalled how she shifted the newsletter to include features for each grade level. Sara stated: “It was hard for 2nd grade to see how the ISA fit in
their instruction, because they thought of it more for kindergarten. I needed to show them how
this content fits into their instruction and language separately” (interview 4, 4/17/2015). These
highlights celebrated teachers and motivated other teachers to be featured in the newsletter by
working with Sara. The building principal e-mailed this newsletter to school community
including parents, teachers, the Board of Education, and other district administrators. The
newsletter grew into a space for Sara and Grace to share, celebrate, and communicate as teacher
leaders and literacy coaches.

**Responsibility: Communicating through E-mail**

Additional responsibilities include e-mailing parents and members of the school
community to create consistency and congruency of language and inform others of instructional
resources and practices related to the ISA. Sara, Grace, and Lisa continuously composed and
responded to e-mails from their colleagues regarding their instructional practices. Figure 9
represents an e-mail Sara composed to a second-grade teacher at Riverside.
In this e-mail, Sara noted what she observed in this classroom and connected it to the content from the ISA book study. For example, in Figure 9 Sara noted how the parking lot game (created by the ISA developers) supported a second grader with sight words. She also noted that she would provide additional resources to this teacher to encourage future opportunities for literacy coaching.

**Responsibility: Communicating through Surveys**

In addition, the responsibility of communication included using Google Drive as a tool to foster conversations. Through Google Drive the teacher leaders created and edited documents, surveys, and presentation slides online together from remote locations. For example, the teacher leaders worked together to create a building-wide Google Survey for the purpose of seeking
feedback and questions to improve their facilitation of content related to the ISA book study.

Figure 10 represents a sample of this Google Survey created by the teacher leaders.

Figure 10. Sample of survey created by teacher leaders.
Sara, Grace, and Lisa worked together to compose a survey where teachers at Riverside could communicate anonymously. Figure 10 shows how the teacher leaders invited classroom teachers to provide feedback based on specific content related to the ISA book study. As they communicated with their colleagues, Sara, Lisa, and Grace remained mindful of their language as they worked to build relationships with classroom teachers. Given the different roles and responsibilities associated with teacher leadership it was important to understand the perceptions of this position. The following sections examine the characteristics of specialized literacy professionals in teacher leadership positions.

Perceptions of Teacher Leader Roles and Responsibilities

The participants continuously reflected on their evolving roles and the responsibilities associated with teacher leadership. During individual interviews at the end of the 2015 school year, I asked the teacher leaders and district administrators: “When your district uses the term “teacher leader,” what does this mean to you?” Overall, the participants described multiple characteristics of teacher leaders. After analyzing their responses, three major themes developed from the data: (1) experience as a classroom teacher; (2) working with others; and (3) engaging as learners. Many of the classroom teachers and administrators identified the teacher leaders’ backgrounds working in Weston School District as supporting their credibility to lead the learning of teachers in the district.

Classroom teachers also recognized teacher leaders’ experience in the district as both classroom teachers and reading teachers. As a first-grade teacher stated: “I think Lisa’s experience as a 1st grade teacher made her a credible teacher leader because she worked in 1st grade so I felt comfortable working with her, because she lived through what I’m living through as a teacher” (focus group 3, 6/25/2015). This first-grade teacher also identified the theme of
working with others as a major characteristic of teacher leaders in this study. The definition of working with others included the entire Weston School community of administrators, classroom teachers, teacher leaders, students, and families. The term “learner” was described by all participants in this study as related to characteristics of teacher leaders. The drive to seek professional knowledge related to a specific discipline is the focus of this common characteristic.

**Characteristics of Teacher Leadership: Teacher Leaders**

I also asked all three teacher leaders: “When your district uses the term “teacher leader,” what does this mean to you?” Sara responded: “I realized that a teacher leader is someone who is excited about learning and that is especially true for me this year” (interview 4, 4/17/2015). Additionally, she commented: “…to me a literacy leader could be a classroom teacher, but definitely needs to be the reading teacher. That expertise in literacy is needed” (interview 4, 4/17/2015). As a leader in multiple roles (teacher leader, literacy coach, and reading specialist), Sara identified teacher leadership as continuing to engage in professional learning as a facilitator and having expertise in a specific discipline. For examples, she attended the ISA workshop and the teacher leadership meetings in her district focused on enhancing teacher leadership skills. During observations of the ISA book study planning sessions, Sara reflected on her notes from these professional development opportunities to inform her facilitation of the ISA book study.

As a teacher leader, Grace explained her involvement in the school community as leadership qualities the district administrators may have envisioned in their selection:

I think because I am a vocal person, too. People know that I feel strongly about a lot of literacy aspects and I’m always encouraging people to do things. And people did seek me out as a resource before I had this role. So that could be where it came from if I had to
read between the lines. Maybe I am a natural leader in my building, but I feel weird saying that, like I’m beefing myself up. (interview 6, 4/17/2015)

Grace identified herself as a natural leader because she communicated with teachers, shared her knowledge, and tried to promote instructional change. Focus group interviews with classroom teachers at Riverside affirmed Grace’s leadership presence. For example, a classroom teacher stated: “Grace was one of the ISA book study leaders. She didn’t work in our school, she was at (intermediate building), but I know her because she’s done a lot of professional development in our district about literacy” (focus group 1, 6/23/2015). This teacher recognized how Grace was already an informal teacher leader in the district at multiple school buildings sharing her knowledge of literacy practices. Her previous participation in leading professional development provided her with a rationale for the district selection process.

During the interview, Lisa reflected on the district’s understandings of teacher leadership. Lisa stated “I think the district is learning about teacher leaders” (interview 5, 4/17/2015). She acknowledged that her district was shifting their definition of teacher leadership. This shift in the definition of teacher leadership influenced how the teacher leaders viewed their positions as undefined and still developing. Lisa also reflected on the district’s rationale stating, “I think that the district has allowed us the freedom to develop our own ideas of who we are as teacher leaders” (interview 5, 4/17/2015). This development resulted in participants experiencing shared and separate responsibilities in their roles throughout the year. Figure 11 captures the characteristics Sara, Grace, and Lisa defined as part of teacher leadership. Their individual characteristics are categorized based on the three major themes found within the data associated with teacher leadership.
While the characteristics from each teacher leader differed, all aligned with the three common themes of (1) experience as a classroom teacher, (2) working with others, and (3) engaging as learners. Sara described the need for teacher leaders to have the background as a classroom teacher. A teacher leader’s background as a classroom teacher supported Lisa’s recommendation for sharing similar situations with colleagues. Grace also identified the importance of experience so colleagues recognize you as a credible source. For Sara, working with others involved modeling excitement and being visible to the school community. In observations of the ISA book study Sara modeled her excitement for the content by describing how the ISA lessons influenced the student outcomes of her reading groups (Observation 7; 12/4/2014).

In order to support classroom teachers, Grace and Lisa both stated that teacher leaders need to provide resources and support so their colleagues will work and learn from them. Grace
stated: “I felt like as a teacher leader I needed to give teachers resources to support them. It’s not just ‘listen to my advice,’ but ‘here are tools that can support you’ and I was the one to provide them with these tools” (interview 6, 4/17/2015). Grace defined resources as materials that would support classroom teachers’ instructional practices. She described the exchange of these resources as a way to promote instructional conversations between teacher leaders and classroom teachers. Finally, all three focused on engaging as learners as part of teacher leadership. As Sara, Grace, and Lisa identified what it means to be a learner in their positions it was a critical quality needed to support others while also having experience and credibility. Sara, Grace, and Lisa all used the term “grow” to describe how teacher leaders continue to attend professional development opportunities in order to further their knowledge and understanding of instructional practices. Lisa used the phrase “pushing yourself to learn more” (interview 5, 4/17/2015) to describe how teacher leaders go beyond the expectations required in their positions in order to support others.

Characteristics of Teacher Leadership: District Administrators

In the final interview, the three participating district administrators also shared their definition of teacher leadership. The same three themes categorized the characteristics of teacher leadership: (1) experience as a classroom teacher, (2) working with others, and (3) engaging as learners. It is important to note this interview occurred at the end of the school year (May-June 2015), and the characteristics described by administrators are based on a full year of implementation of these new positions. Figure 12 illustrates the district administrators’ individual definitions of teacher leadership.
<table>
<thead>
<tr>
<th>Themes</th>
<th>Administrator 1</th>
<th>Administrator 2</th>
<th>Administrator 3</th>
</tr>
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</table>
| Experience as a classroom teacher | • Not just “go to” people  
• Morphing term  
• Student-Centered | • Expertise in different skills and strategies  
• Students in mind | • Confidence  
• Professionalism |
| Working with others            | • Model for others  
• Implementing what they learned into the classroom | • Feeding intellectual needs of our teachers as adult learners | • Inspires and motivates others  
• Creates engaging learning situations |
| Engaging as Learners           | • Invested in seeing instructional practice change  
• Growing as a professional | • Drive to grow and learn more  
• Questions the status quo | • Continuously growing and developing |

*Figure 12.* Characteristics of teacher leadership as defined by participating district administrators.

The administrators emphasized the importance of credibility through experience when selecting teacher leaders. Administrator 2 stated: “We considered the experience of working with students during our selection process of teacher leaders. Teacher leaders’ positions should be to work with other teachers, but at the end of the day our goal is to support our students. So, teacher leadership needs to be student-centered” (interview 2, 4/17/2015). Two administrators identified the importance of teacher leaders having experience working with students as an essential characteristic. A third administrator described the confidence teacher leaders need in their positions, with this confidence stemming from experience in their school building and working with other teachers. One administrator stated that teacher leadership as a “morphing term.” Over
the year the understanding of “teacher leader” developed, evolved, and changed for both the administrators and teacher leaders.

The responses from district administrators under the theme of working with others directly aligned with similar characteristics noted by Sara, Grace, and Lisa. Common characteristics included the need for teacher leaders to be engaging with and modeling for teachers to build communication about instructional practices. While the three administrators responded using different terminology, they all emphasized the need for teacher leaders to work with members of the school community. A district administrator stated:

Teacher leaders need to feed the intellectual needs of our teachers as adult learners, but we realized that we didn’t create time for them to do that. We just thought they would happen organically, but providing teacher leaders with time in their schedules to meet with other teachers, like Sara and Grace had as coaches, might have promoted more unity among teacher leaders and classroom teachers. (interview 2, 4/17/2015)

This second administrator reflected on the importance of teacher leaders working with classroom teachers, and also identified a need to create time for these opportunities to occur. At the same time administrator 3 noted that it the responsibility for teacher leaders to create these opportunities.

Finally, the characteristics that aligned with the theme of engaging as learners was represented in all three district administrators’ interview responses. Another district administrator commented on the teacher leaders’ drive to learn more by describing teacher leaders service involvement:

They (Sara, Grace, and Lisa) were always active in committees that shaped the literacy curriculum in the district. All of them went above and beyond their required district
commitments, so when we were choosing teacher leaders this was one of the qualities we looked at. We wanted to invite teachers who already were informal leaders already and had an active presence in the district. (interview 2, 4/17/2015)

This administrator acknowledged service as a quality the district associated with leadership. The district administrator already identified Sara, Grace, and Lisa as educators who exceeded the requirements of participating in district committees and events. When administrators formally recognized Sara, Grace, and Lisa as teacher leaders, they all personally chose to increase their involvement in district and community services. The term “grow” was used to describe teacher leaders by Sara, Grace, and Lisa, as well as by the district administrators. The notion of growing as a professional learner is the characteristic most associated with research on specialized literacy professionals and teacher leaders (Calo et al., 2015; ILA, 2015; Snell & Swanson, 2000; Walpole & McKenna, 2013; York-Barr, 2014).

**Engagement of Teacher Leaders**

Throughout the 2014-15 school year, each teacher leader identified ways the grant initiative increased their learning. This included their involvement with district services and engagement in the school community. Prior to the district being awarded the STLE-3 grant, the teacher leaders in this study all participated in building/district committees and organized school events.

The STLE-3 grant (see Appendix A) did not specifically address the need for teacher leaders to be on committees or organize district events. However, district administrators did encourage teacher leaders to support their colleagues. For example, at the district teacher leaders’ professional development, topics covered involved mentoring new teachers, leading professional development, and modeling lessons. These topics are all associated with ways to help teacher
leaders support their colleagues. In addition to the district teacher leadership professional
development, all three teacher leaders also engaged in the ISA book study to enhance their
knowledge of early literacy instruction and intervention. Sara, Grace, and Lisa recognized that
STLE-3 funded these learning opportunities and influenced their involvement with district
service. Interviews with Sara, Grace, and Lisa revealed the service work they provided before
engaging in the grant initiative and after. Figure 13 represents the increase in their service
involvement.

<table>
<thead>
<tr>
<th>Teacher Leaders</th>
<th>Service involvement one year before STLE-3 grant (2013-14)</th>
<th>Service involvement during the STLE-3 implementation year (2014-15)</th>
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<tbody>
<tr>
<td>Sara</td>
<td>ELA Committee</td>
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<td>Reading Department Committee</td>
<td>Reading Department Committee</td>
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<td>Primary Building Planning Team</td>
<td>Curriculum Planning Committee</td>
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<td>SPED Review Committee</td>
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<td>Response to Intervention Committee</td>
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<td>PARP Nights: Pre-K/Literacy Mentor Program</td>
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<td>Grace</td>
<td>ELA Committee</td>
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<td>Reading Department Committee</td>
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<td>Curriculum Planning Committee</td>
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<td>Site-Based Planning</td>
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<tr>
<td>Lisa</td>
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*Figure 13. Teacher leaders’ involvement in district service.*
As shown in Figure 13, the involvement of Sara, Grace, and Lisa increased as a result of the STLE-3 grant. As reading teachers, Sara and Grace already engaged in literacy-related services in their buildings. As a result of the STLE-3 grant their positions shifted to teacher leader and literacy coach. This shift increased their involvement with services related to literacy. Sara stated: “We had all this knowledge from going to the ISA workshop, so it felt like we needed to communicate that to our colleagues by being involved in these committees” (interview 1, 4/17/2015). The ISA workshop enhanced Sara’s knowledge of early literacy and gave her the confidence that she would be a valued member of committees on early literacy instruction such as the Response to Intervention (RtI) and the ELA committee.

While these teacher leaders increased their involvement in committees and events, all of them still remained active in the same services they had engaged in prior to the grant. Lisa explained her continued involvement on the ELA committee stating: “I was still part of the ELA committee, but now my role has changed” (interview 2, 4/17/2015). Prior to the grant, Lisa worked as a first-grade teacher but had shifted her title/position to a teacher leader/literacy specialist. Lisa chose to remain on the ELA committee to represent her new position/title, which changed her contributions to early literacy instruction and intervention. Grace reflected on her increase in service:

Whereas in the past, you know, I might have limited my involvement in different literacy initiatives. I feel kind of empowered and motivated being a part of these committees. I can really bring something to the table. I’m a teacher leader and a literacy coach. It’s a big deal and that’s what my colleagues know me as now. (interview 6, 4/17/2015) Grace acknowledged the learning opportunities funded by the STLE-3 grant increased her literacy services. She recognized that the grant not only changed her position/title, but also her
identity as an educator. Grace used the words *empowered* and *motivated* to describe how the grant changed her feelings toward working with her colleagues. Grace also explained how the grant changed the way her colleagues view her, because of her title and literacy knowledge.

The timeline of this initiative also influenced the participants’ involvement in district service. Administrators told all teacher leaders that the STLE-3 grant only funded their positions for the (2014-15) school year. An administrator stated: “We addressed that the STLE was just a one-year initiative and we needed to make the most of this year with the support of teacher leaders” (interview 2, 4/17/2015). The administrators shared the importance of teacher leaders’ involvement and engagement in the school district because of the grant. Grace commented on the timeline of her position as teacher leader and literacy coach: “I just feel pressure with this role as a teacher leader and literacy coach to really have to be involved in many different things for it to be a worthwhile year” (interview 4, 4/17/2015). Grace felt responsible to participate in different learning opportunities to make the most of the year. Lisa affirmed: “We all want to know what is going to happen next year. Will there be teacher leaders after the grant is over? I’m not sure, but that is why I really wanted to be part of these committees because as a teacher leader I felt it was my duty to this year” (interview 2, 4/17/2015). Lisa recognized one of her duties as a teacher leader includes providing service to the school community. The uncertainty of keeping her position as a teacher leader the following year resulted in her appreciation and increased engagement with district service the year of the grant.

Sara, Grace, and Lisa had all actively participated in district service committees prior to the implementation of this grant initiative. They indicated that the STLE-3 and the ISA book study provided them with the formal title(s) of teacher leader and facilitator, which influenced how they interacted with the school community. Their new title and new knowledge increased
their confidence and involvement with additional district service committees. Each of these participants recognized the need to use their new positions to improve the early literacy practices of the school community.

**Overall Roles and Responsibilities**

The roles of teacher leaders identified in this study included professional development provider, curriculum developer, co-teacher, and communicator. There are multiple responsibilities associated with these roles, which evolved based on teacher leaders’ engagement with members of the school community at Riverside. The teacher leaders and district administrators also evolved in their separate understandings of teacher leadership. Additionally, the formalization of teacher leadership resulted in all three teacher leaders increasing their level of service within the district. The experiences of these specialized literacy professionals in formalized teacher leadership positions provide one example of how a school community is working with teacher leaders. The roles and responsibilities these teacher leaders engaged in could provide insight into how the larger field of literacy is examining the levels of roles and responsibilities associated with specialized literacy professionals.

According to the International Literacy Association (ILA, 2015) research brief on specialized literacy professionals, coaching responsibilities can be required in leadership roles, while the types and frequencies often differ. ILA (2015) suggests analyzing specialized literacy professionals’ responsibilities by categorizing coaching activities on three levels of intensity. This three-level framework includes: (1) informal; building relationships, (2) more formal; somewhat more intense; begin to analyze practice, and (3) formal more intense; focus on changing practice. In order to categorize the intensity of Sara, Grace, and Lisa’s roles and responsibilities this three-level framework is applied in Figure 14.
<table>
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<tr>
<th>ILA Levels</th>
<th>Roles and Responsibilities at Riverside</th>
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| **Level 1** Informal: Building relationships | • Attend district special events (mentor meeting and family literacy night)  
• Develop schedules and curriculum with teachers  
• Communicate through e-mail, Google Doc, newsletter, phone, flipped videos, surveys  
• Develop and provide materials for colleagues |
| **Level 2** More formal: begin to analyze practice | • Meet with district administrators  
• Lead curriculum planning meetings  
• Participate in district teacher leader meetings  
• Participate in ISA web-enhanced professional development Summer workshop |
| **Level 3** Formal: Change practice | • Co-plan and co-teach with classroom teachers  
• Model instructional practices for teachers  
• Facilitate ISA book study  
• Provide feedback to teachers on their lessons  
• Plan and organize ISA book study |

*Figure 14. Levels of roles and responsibilities associated with participating teacher leaders.*


This framework illustrated how the roles and responsibilities of the teacher leaders in this study include all three levels of intensity (build relationships, analyze practice, and change practice). All three participants engaged in level-three responsibilities of communicating ways to and creating opportunities for teachers and the district to change practices related to literacy. These findings contribute to the evolving research on specialized literacy professionals and teacher leaders as to how these positions can influence instruction. Additionally, these findings inform the evolving definitions of specialized literacy professionals and teacher leaders as change agents.

**Summary**

As specialized literacy professionals in formalized teacher leadership positions, Sara, Grace, and Lisa had multiple roles and responsibilities. Each of them took on the roles of
professional development provider, curriculum developer, co-teacher, and communicator. In addition to these roles connected to responsibilities, all three teacher leaders chose to independently increase their service in Weston School District after accepting the formalized position of teacher leader. Their involvement suggests formalized teacher leadership positions can influence how teachers support and engage with their school community. While the responsibilities associated with these roles supported the professional learning of their school community, they all identified a need for creating opportunities to promote the professional learning of teacher leaders so they can continue to grow as both learners and leaders.
CHAPTER 6
Support Systems for Teacher Leaders

Research on teacher leadership addresses the need for teacher leaders to continuously advance their knowledge and leadership skills (Bean et al., 2015; Hoffman & Pearson, 2000; Kisch, 2009). To that end, it is important to examine how practicing teacher leaders are seeking support as learners. Therefore, the second research question asks: When implementing the grant initiative, what structures and resources did the teacher leaders find most helpful as learners? A basic definition of structures is how educators construct, organize, and design means of support (Darling-Hammond et al., 1995). The resources constitute the materials or supplies teacher leaders need to perform specific tasks. This section examines the structures and resources Sara, Grace, and Lisa found most helpful as learners.

Using triangulation, I distinguished themes from all data sources to note how Sara, Grace, and Lisa accessed information to support their positions. I then looked across these themes to determine specific support systems that provided Sara, Grace, and Lisa with structures and resources. The two key support systems that teacher leaders continuously identified were: (1) Weston School District Administrators and (2) the ISA developers. These two key support systems provided the teacher leaders with various structures and resources to enhance their positions as both leaders and learners.

The district administrators created structures to support teacher leaders with their new leadership positions and implementation of the ISA book study. The structures that supported teacher leaders from the ISA developers were the ISA workshop and ISA book study content. In this chapter, I examine each support system to determine specific resources teacher leaders recognized as helpful to them as learners. The district administrators also provided teacher
leaders with resources to support them as leaders and learners. The resources from district administrators included technology, teacher leadership professional development, and administrative support. The ISA developers also provided teacher leaders with resources such as EIRD and the ISA website. Identifying these structures and resources from supporting systems helps to further understand what teacher leaders need in their positions to continuously advance their learning and leadership.

Structures

Structures Created by District Administrators

As a result of creating teacher leadership positions, the building principals, the assistant superintendent, and the superintendent needed to organize multiple structures intended to support the educators selected for these positions. A district administrator stated: “… the grant (STLE-3) provided the structure to build what we built, because if we didn’t have this structure then we couldn’t in our district, could not afford coaches or teacher leaders” (interview 3, 5/5/2015). This administrator identified the STLE-3 grant as the core structure connected to the development of teacher leaders in the school community. The district administrators created specific structures to support teacher leaders and specialized literacy professionals. Data analysis revealed that district administrators created two common structures influencing the literacy roles and responsibilities of teacher leaders: (1) new leadership positions and (2) the implementation of the ISA book study.

**Structure 1: New leadership positions.** When the district created the enhanced literacy positions for Sara, Grace, and Lisa, there was an immediate shift in their job titles. For example, Lisa shifted from being a first-grade classroom teacher to a being first-grade reading teacher. Lisa described her new position:
I am working with all nine sections of first grade. I really am working at full capacity which is what has contributed to the success of this year. I’m still at heart a first-grade teacher, and so I am a first-grade teacher who has the luxury of being able to work in small group with first graders, focusing specifically on literacy. (interview 5, 4/17/2015)

This structure allowed Lisa to utilize her experience and expertise working in first grade. The new position/title focused her instruction specifically on first grade literacy-related skills, strategies, and practices. During a focus group interview with first-grade teachers, one teacher commented: “Lisa is such an expert at first grade, she’s been doing it forever. I felt I could go to her and really talk about the students we shared and what do to during my reading groups. I trust her” (focus group 3, 6/25/2015). Both the first-grade teachers and Lisa recognized how the structure of her position contributed to the success of her collaboration and communication with the school community.

Similarly, the district designed a new structure for both Sara’s and Grace’s teaching positions. As full-time elementary reading teachers, their new job title changed to (.5) reading teacher and (.5) literacy coach. The district provided them with the opportunity to become literacy coaches while still teaching reading groups. Sara reflected on her new job title:

So, this year I am .5 reading teacher and .5 literacy coach, which is new and there is some overlap for me because a lot of the coaching I’m doing is directly linked to my teaching which is very cool. So, my roles I see them as intertwined. And in my teaching this year, I am just working with kindergarten students this year, which is new and it has been absolutely amazing to be linked to one grade level. (interview 4, 4/17/2015)

Similar to Lisa, Sara recognized that the responsibility of teaching only one grade level contributed to her success in this new position. As a teacher leader in a split position, she
identified her roles as overlapping or intertwined, suggesting the benefits of working with her colleagues. Additionally, the kindergarten teachers referred to Sara as an expert with whom they felt comfortable collaborating (focus group 1, 6/23/2015). The structure of Sara’s and Lisa’s positions supported the consistency and congruency of instructional practices among colleagues within one grade level.

Unlike Lisa’s and Sara’s responsibility of working with only one grade level, the district structured Grace’s position to work with all grade levels in the intermediate (3rd-5th) building. Grace commented:

I’ve had third, fourth, and fifth graders and I can follow my third graders as they went up in grade levels and by fifth grade many had cycled out and it was wonderful to actually see that, because you often don’t get to see that as a teacher. It’s just hard to really focus on multiple grade levels when you have a split position, like some days I wouldn’t get to see a whole grade level, because I needed to cancel groups to go meetings (interview 6, 4/17/2015).

As a reading teacher, Grace recognized it was important to follow the growth and progress of students as they moved up grade levels. She also understood that the demands of her position often resulted in an inconsistency of teaching time with students across grade levels. The three teacher leaders all agreed the structure of Sara’s and Lisa’s positions supported their planning and also meeting the needs of learners with the same grade-level expectations.

**Structure 2: Implementation of the ISA book study.** District administrators chose to implement many new initiatives including new leadership positions, flipped videos, and the teacher leadership professional development for the 2014-15 school year. However, the ISA
book study was the main professional development being implemented at Riverside. A district administrator stated:

As far as the ISA goes I made that the building goal, because I find that when teachers receive a lot of professional development that the more focused it is the better and just based on my experience with the teachers, I’ve always been that administrator that offers a lot of experience to teachers, but I find that as a leader that if we’re not focusing people then people are tending to feel like they are being pulled in twenty different directions. (interview 3, 5/1/2015)

This district administrator recognized the need to implement one initiative to engage the school community. This structure provided teacher leaders with the opportunity to invest their time and build their knowledge in one specific area, early literacy instruction. Lisa commented on this district structure:

ISA is a district initiative. It’s an expectation. We are learning this year and for the Fall of 2015 we will be implementing these strategies and it’s an expectation that when people go into your classroom they will see evidence that you are incorporating the strategies that you learned and that was true of ISA. It’s focused our instruction. (interview 6, 4/17/2015)

Lisa recognized how the structure of the ISA implementation helped the whole school community align to a specific framework on ISA instructional goals and theories.

The implementation of the ISA book study helped teacher leaders to create a common language with the classroom teachers at Riverside. Sara described the importance of creating a common language: “Just focusing on the ISA really helped us get everyone aboard because the teachers could communicate across grade levels about strategies and resources related to the ISA.
It’s like everyone was on the same page” (interview 4, 4/17/2015). For example, Figure 15 shows how the school district created a common source for the congruent terms the classroom teachers at Riverside would all use that align to the ISA. The congruent terms represented in Figure 15 supported the consistency and congruency of terminology used across the K-2 building. All classroom teachers could collaborate and communicate on early literacy practices centered around the ISA using consistent terms.

Figure 15. Example of how the teacher leaders’ supported classroom teachers by creating congruent school-wide terms.

The structure of implementing the ISA book study also reinforced how the district was invested in the success of one initiative. For example, Grace stated: “I think by the district only focusing on the ISA motivated me to really to help support teachers improve early literacy
practices. I knew that this was important to them because we were only focusing on the ISA” (interview 5, 4/17/2015). Grace recognized that the structure of implementing the initiative promoted her engagement with the content. This structure created the opportunity for teacher leaders to focus on the primary professional development being implemented at Riverside.

**Summary of Structures Created by District Administrators**

Overall, teacher leaders identified two structures constructed by district administrators as being helpful to them as learners: (1) new leadership positions and (2) the implementation process of ISA book study. Specifically, the teacher leaders appreciated the district structuring their enhanced literacy positions. Sara’s and Grace’s split positions and Lisa’s special assignment position supported their work with colleagues and enriched their own instructional practices. In addition, all three participants suggested the implementation of the district initiative supported teacher leaders’ consistency and congruency of language and instructional practices.

**Structure Created by the ISA Book Study Developers**

The ISA developers designed a professional development book study for primary (K-2) teacher leaders. This professional development prepared teacher leaders to engage with their colleagues in a web-enhanced book study focused on the Interactive Strategies Approach (ISA) and its use in efforts to prevent early reading difficulties (K-2). These providers structured this book study to build teacher leaders’ knowledge on the content, so they can later share this information with their school communities. Interviews and observations with Sara, Grace, and Lisa showed that the structure of the ISA book study phases supported their learning and facilitation of the content.

**Structure 1: ISA book study phases.** Initially, the teacher leaders all attended a 32-hour summer workshop to enhance their learning of the content and provide a vision as to how
the providers intended for the ISA book study to be facilitated. Following their attendance at the workshop, they facilitated the ISA book study at Riverside. Sara described how the structure of these phases supported her as a learner:

   It was the first thing in a long time that directly I was learning about something, but it came at a time when I could be reflective about my teaching, and I could really see myself like through the whole training I was constantly thinking about my students, and my teaching, and how I could change what I was doing. (interview 4, 4/17/2015)

She identified the ISA workshop as helpful to her as a learner and as an educator. This workshop provided Sara with the space to reflect on her practices and recognize what shifts she needed to make in her instruction.

The structure of attending the ISA workshop first supported the teacher leaders’ confidence and credibility on the ISA instructional practices. Lisa reflected on attending the ISA workshop: “It made me feel more qualified that I could do this, I understand it, and I’ve been a resource to my colleagues to roll it out and to give ideas and to push into classrooms and demonstrate lessons” (interview 6, 4/17/2015). Lisa recognized the workshop supported her as a learner and also an ISA expert within the school.

The teacher leaders also articulated how the structure supported their understanding of the ISA content. For example, Grace reflected on how attending the ISA workshop as a participant first helped her to become the lead facilitator at Riverside:

   It was really intense, but it helped me to reflect on what I was doing and it was the first time when I’ve been reading, re-reading, and re-reading a book. You know normally we read a book and I’d be done and we might not even implement it. Because I was presenting the information, I was motivated to constantly go back and look at the book as
a guide so this model of professional development really worked for me. (interview 5, 4/17/2015)

Grace said she was motivated to learn the content at the ISA workshop because she knew that her position involved later presenting this same content to her colleagues. The ISA phases created a structure for the teacher leaders to become engaged in the EIRD before their colleagues at Riverside. The teacher leaders had time to reflect on the content in order to become knowledgeable as facilitators.

**Summary of Structures Created by the ISA Book Study Developers**

Sara, Grace, and Lisa all articulated how the recommended phases of the ISA book study were helpful to them as learners. The three participants recognized that their participation in the workshop increased their confidence and expertise on early literacy learning to further support their colleagues’ instructional practices. In addition, the teacher leaders showed how ISA book study content aligns directly to the EIRD to build their understanding of research and instructional goals. While the structure of this content supported the participants’ learning, chapter seven examines how the teacher leaders chose to facilitate the ISA book study at Riverside.

**Resources**

**Resources Provided by District Administrators**

District administrators provided multiple resources intended to support Sara, Grace, and Lisa in their new positions. The resources they frequently relied on and found most helpful as learners included technology, teacher leadership professional development, and administrative support.
**Resource 1: Technology.** Technology was a key resource identified by all teacher leaders as helpful to their positions. The STLE-3 grant funded each teacher for an iPad and laptop with programs to upload and edit instructional videos. Sara stated: “The fact that I have an iPad and a laptop is mind-blowing, because there is no technology at (Riverside). This grant has bought the technology so that has been amazing” (interview 4, 4/17/2015). Sara recognized the value of having access to technology and the importance of the STLE-3 grant in supplying these resources to teacher leaders. Lisa also highlighted the importance of this resource, stating: “They provided us with the iPad, and I am afraid that they will take it away. But I have utilized instructional videos and to maintain my communication log with teachers on Google Docs and I really use it a lot” (interview 5, 4/17/2015). The iPad became a tool for Lisa to reflect on her own teaching by viewing videos of her teaching, as well as a way to communicate with her colleagues using the interactive platform Google Docs.

Based on the STLE-3 grant, district administrators required all teacher leaders to create flipped classroom instructional videos. This requirement is evident in an excerpt of the STLE-3 grant located in Appendix A. Traditionally, flipped videos include instructional content created by teachers that students can access at home to enhance their learning outside the classroom in a blended learning approach. The district required the participants in this study to create instructional videos of strategies or practices to enhance the learning of their colleagues. This involves modeling or co-teaching lessons that connect to the ISA professional development. The district had these videos created to provide a video library for the school community to access to support students’ instruction.

The district administrators embedded technology professional development as part of the STLE-3 funding. Outside experts recruited by district administrators led this professional
development to support teachers’ creation of flipped videos. Sara reflected on this professional
development, stating: “Another resource that has been amazing was the training through the
STLE grant with the E-tech guys. Just learning about Google Docs, and iMovie, and Vimeo, and
the fact that I know how to edit a video is mind-blowing” (interview 4, 4/17/2015). The
technology support extended beyond the teacher leaders. For example, in a focus group
interview a first-grade teacher stated: “Lisa was showing me things she learned on the iPad that I
wanted to use in my classroom. At one point, we talked about doing a video for parents to show
them how our students use the ISA” (focus group 3, 6/25/2015). This teacher recognized the
importance of technology as a resource for collaborative projects involving the school
community.

District administrators also encouraged the teacher leaders to join Twitter as a safe social
network to share and celebrate the success of the school community. Grace stated:

Getting on Twitter has actually opened my eyes, because I feel like it’s easier to find
information in regards to what I am looking for. I think just using the technology in an
effective way really helps me because I am learning so much from what people are
tweeting and sharing and it leads me to articles so that is something I think I will always
do. (interview 6, 4/17/2015)

As a learner, Grace stated this technology platform was a resource to support her own
instructional practices. While the district supplied the tools and support for technology, creating
the videos also became a stressful demand. For example, Sara stated:

I just felt rushed at the end of the year to make them. I wanted them to be good quality so
I was taking a lot of time editing them and I knew the district might show them to other
teachers. My name was attached with this video so I wanted it to be good. I ended up
making a lot of my videos at home because there was no time to do it and we had a deadline. (interview 4, 4/17/2015)

Sara realized that the district mandate for the number of videos and associated deadlines forced her to engage with the technology. At the same time, she also recognized how much time was needed for her to create these videos as one of her roles and responsibilities. Overall, although finding time was a challenge, technology served as a valuable resource to promote alternative ways for teacher leaders to reflect on instructional practices with their colleagues.

**Resource 2: Teacher leadership professional development.** The district administrators required all twenty-seven selected teacher leaders to attend professional development throughout the 2014-15 school year. A district administrator commented:

> The STLE days are important because it was intended to create collegial space for all teacher leaders in the district. The first part of this was training in some specifics of the grant, so definitely the technology aspect of the video portion was big so specific targeted PD that was written for this grant, we also wanted to focus on what it means to be a teacher leader, leading PD, mentoring, working with teachers. So, we focused on building that into the STLE meeting days. (interview 2, 4/17/2015)

The district called the meetings ‘STLE days’ to align with the name of the grant. Throughout this study, the teacher leaders met four times for a total of approximately 16 hours. Appendix I captures each observation of teacher leaders attending professional development.

The most important resource identified by teacher leaders at the STLE professional development included time to collaborate and access to colleagues in the same position. Grace stated:
It was great to talk to other people in the district. We don’t really get the opportunity to meet with the high school or middle school teachers and that time gave us the chance to talk about how we each give PD or work with other teachers in the building. I learned about how they do PowerPoints, what they are doing for their flipped videos, and really more about what teacher leadership means at their building. (interview 6, 4/17/2015)

This professional development provided a time for teacher leaders to reflect on their positions, and, in turn, provide feedback to the district on their positions. Sara commented on having outside experts: “She helped me think about how to create PowerPoints when doing PD. I felt lucky to learn from her and appreciated that the district found someone with such an impressive background to speak to us” (interview 4, 4/17/2015). Sara recognized how the district administrators provided this resource to support her as a teacher leader. She felt validated as a professional that her district offered meaningful professional development led by a credible expert. This resource reinforced the need for districts that have teacher leaders to create opportunities for teacher leaders to receive their own professional development to support their learning.

**Resource 3: Administrative support.** Teacher leaders identified communication and access to district administrators as an important resource to support their positions/learning. This included time for face-to-face conversations with principals, assistant superintendents, and superintendents. Lisa reflected on this resource:

Someone had described teacher leaders as middle management, and I don’t feel that way. It’s given us access to administration. That’s another thing. It’s given me the opportunity to talk to (district administrators) that I never had before. I’ve made a joke that I have been in the district for 16 years and (district administrator) doesn’t even know
who I am and now (district administrator) knows who I am. You know what I mean I’m sure. (District administrator) heard my name or whatever, but to pick me out I don’t know if (district administrator) could, because we were never together on anything.

(interview 4, 4/17/2015)

She stated that her new position increased her engagement and conversations with administrators. Lisa also explained how she felt valued by her leaders in this position.

At least two administrators attended every STLE day and three district administrators attended the ISA summer workshop. These events created opportunities and time for Sara, Grace, and Lisa to engage with district administrators. In addition to engaging with administration, teacher leaders also appreciated the responsiveness of administrators to their needs. For example, Grace recalled a time she needed support in her new role as a literacy coach: “(District administrator) purchased us materials as needed. Sara had found a book over the summer I don’t know if she mentioned it; it’s a literacy coaching book that was very helpful to read that” (interview 6, 4/17/2015). She felt comfortable asking district administrators for resources to support her learning, and appreciated that they purchased what she needed.

At each professional development session, one or more of the three participating district administrators attended. Appendix F provides the attendance of each ISA book study session. The administrators did not just sit and observe professional development, but interacted with participating teachers. For example, during one of the professional development sessions for teacher leaders, a district administrator sat alongside teacher leaders learning how to edit flipped classroom videos (observation 6, 12/4/2014). This administrator engaged in conversations with teachers on how the content of the videos supported student learning.
When the district administrators attended the ISA summer workshop, they each read the EIRD book and engaged in conversations regarding early literacy instruction and intervention with the three participating teacher leaders in this study. A district administrator stated:

It was important for us to attend the ISA workshop. We didn’t want to implement something that we didn’t understand or have knowledge about. If we expected our teachers to read the book and learn about the ISA content, we needed to do the same too. The STLE gave us the funding so all of us could attend so we could buy books for everyone. (interview 1, 6/17/2015)

This administrator recognized the importance of participating in professional development alongside teachers and how the STLE-3 grant provided the funding to support their attendance. A different administrator stated: “The ISA workshop was designed for teacher leaders, but they (Sara, Grace, and Lisa) just became teacher leaders because of the STLE. As district leaders, we felt the need to be there to support them” (interview 3, 5/11/2015). This administrator also affirmed the importance of their attendance to support teacher leaders and learn with them. They also both recognized that a responsibility of district leaders included mentoring teacher leaders and how the grant influenced their involvement with professional development.

The classroom teachers reflected on how the STLE-3 grant impacted the administrators’ participation in professional development. A kindergarten teacher stated: “Once the district got the grant it was like administrators were always at our PDs. Like the superintendent came to an ISA PD. The superintendent. It made me feel like what we were learning was important because (the superintendent) was there” (focus group 1, 6/23/2015). For this teacher, the superintendent’s involvement in the ISA book study validated the importance of the content and the district’s
investment in the ISA. Additionally, this teacher also recognized that the grant increased the administrators’ attendance at district professional development sessions.

Towards the end of the school year, district administrators reflected on their engagement with the grant in relation to professional development. One administrator stated: “The STLE held us more accountable as district leaders, because the goal of the STLE was to increase our teachers’ learning, so essentially we needed to be involved with their learning while increasing our own too” (interview 2, 4/17/2015). This administrator used the term accountable to describe the goal of the grant focused on teachers actively participating to enhance their learning and instructional practices. District administrators felt a need to encourage this active learning by participating with teachers. A different administrator commented: “The STLE really helped our district to reflect on leadership and be mentors for our teacher leaders and that includes going to the ISA PD with them” (interview 3, 5/11/2015). This administrator credits the grant for redirecting how administrators support and mentor teacher leaders. While the grant encouraged administrators to participate in professional development with teachers, these administrators all valued their interactions and experiences.

The district administrators appeared to value the importance of everyone collaborating and learning together. The administrators had previous experiences in which they participated and attended professional development prior to this grant initiative. However, the implementation of the STLE-3 further increased their awareness of the importance of being involved in these events. They learned to collaborate, communicate, and mentor teacher leaders through their engagement with this grant. The administrators also identified the importance of using the grant funding to support teacher leaders with professional development that fosters teacher leaders as professional development facilitators.
Summary of Resources Provided by District Administrators

Overall, teacher leaders identified three resources provided by district administrators as being helpful to them as learners: (1) technology, (2) teacher leadership professional development, and (3) administrative support. The STLE-3 grant funded the technology and professional development for teacher leaders. District administrators recognized the need to include these resources when writing the STLE-3 grant to support teacher leaders in their new positions. Technology, including tools and programs, helped Sara, Grace, and Lisa to reflect on their teaching and create instructional videos for their colleagues. It became a resource for teacher leaders as well as the school community, but requiring videos with tight deadlines could impact the quality of videos if teacher leaders feel rushed. The STLE professional development also increased the participants’ confidence and leadership skills. Sara, Grace, and Lisa all identified how this professional development provided them with time to collaborate with colleagues in the same position and learn from outside experts. In addition, all three participants recognized how communication and accessibility with district administrators helped them both as learners and leaders.

Resources from the ISA Book Study Developers

The participants all attended the ISA summer workshop targeted for teacher leaders who serve a critical role in supporting their school’s implementation of new instructional approaches. The developers and providers of the ISA designed this professional development to build teachers’ knowledge of the ISA and its use in efforts to prevent early reading difficulties (K-2). The intended goal involves preparing participants to facilitate the learning of this content in their schools using content and materials aligned with the EIRD (Scanlon et al., 2010). Sara, Grace, and Lisa identified two resources created by the ISA book study developers that supported them
as learners, teacher leaders, and professional development facilitators: (1) EIRD book and (2) the ISA website.

**Resource 1: EIRD.** Sara, Grace, and Lisa all referenced the importance of the EIRD text throughout the school year. For example, Lisa reflected on the EIRD resource stating: “I just filled the book with post-it notes! It was such a valuable resource that I brought it with me home and to school” (interview 5, 4/17/2015). Lisa described how Post-it Notes marking important pages spilled out of her EIRD book. During observations of the ISA book study planning sessions and meetings with administrators, all participants carried the EIRD book. Sara reflected:

> I think we just always had it with us because I knew I could always go back to the book if a question came up or I needed to explain my thinking or reasoning to a teacher. It had the research in it too and that was huge. What we were doing was based on all this research so it was just like the most important book to me this year. (interview 4, 4/17/2015)

Sara shared how the EIRD enhanced new knowledge and supported her conversations and coaching with her colleagues. The classroom teachers identified the importance of owning the EIRD book. A first-grade teacher commented:

> I know it was important for us to read, because the district bought it for us. It was a book study for the whole building. I liked that it wasn’t just we read it home and then we don’t talk about it again, because that has happened in the past you know. We reflected on the readings throughout the whole school year at the ISA PD days. (focus group 3, 6/25/2015)
This first-grade teacher recognized that the EIRD differed from other professional texts provided to teachers in the district. The ISA book study and full implementation of the ISA in the building increased teachers’ engagement with reading the EIRD. The book also provided a learning tool in which teacher leaders developed a common professional resource to engage the school community in conversations about early literacy instruction.

**Resource 2: ISA website.** The developers of the ISA provided teacher leaders with a private username and password to an informational website related to the content of the EIRD and the ISA workshop. The STLE-3 provided funding for each teacher leader to access this website throughout the 2014-15 school year. This website includes multiple features: instructional videos aligned to the EIRD chapters/topics, printable materials/games/assessments, archived webinars of the ISA workshop, research on the ISA, resources for parents, and printable supplementary resources.

A visual of the ISA website home page that teacher leaders accessed on the ISA website is captured in Appendix B. This image is a screenshot from the website where any identifying information has been removed. As evident in Appendix B, the teacher leaders could access instructional videos by topic and recorded presentations aligning with the ISA book study. There is also a specific link on the website dedicated to the ISA resources. The teacher leaders continuously accessed this website throughout the school year. Sara commented:

The ISA website has been phenomenal. I’m really sad that I won’t have access to that anymore so I am really trying to use that as much as I can. I’m on there all the time so that has been a huge resource for my reading instruction but also for the PD. (interview 4, 4/17/2015)
She described how access to this website supported her as a reading teacher and facilitator. The funding of the STLE-3 grant provided teacher leaders with access to this website for one school year. Sara admitted her fear of losing access to this resource, which affirmed the importance of this website for her as a learner and teacher leader.

At every ISA book study and planning sessions observed throughout this study, the teacher leaders accessed instructional videos and materials from the ISA website. Grace reflected on her activity with the website stating: “The ISA website helped us to plan to PD. I could log on at home if I wanted to. We loved the videos on the website and so did the teachers. It was just a great resource that we needed to make the PD come alive” (interview 6, 4/17/2015). She recognized how the website provided additional means to engage the school community with the ISA. The website also supported teacher leaders’ ability to plan at different locations since they could log in to the website from any location.

**Summary of Resources from the ISA Book Study Developers**

The ISA book study developers also offered multiple resources to support teacher leaders. Throughout this study Sara, Grace, and Lisa relied on the EIRD book and the ISA website as resources to support them as learners. They recognized the EIRD book as a critical text for specialized literacy professionals, but also as an anchor text to ignite conversations with teachers at Riverside. The ISA book study directly aligned with the chapters and topics within the book, so teacher leaders continuously referred back to the text to continue the ISA book study discussions. This resource supplemented the content in the EIRD book so it became an interactive tool for teacher leaders to help facilitate the ISA book study.
The structures and resources that teacher leaders found most helpful as learners influenced the way they facilitated. The next chapter examines each of the approaches Sara, Grace, and Lisa used to facilitate teacher learning at Riverside.
CHAPTER 7
Facilitating Teacher Learning

In this chapter, I focus on the third research question: *In what ways do teacher leaders in a primary (K-2) school facilitate teacher learning to support early literacy instruction?* The process of facilitating involves interactively guiding and leading conversations to foster change (Bean et al., 2015; Dole, 2004; Killion & Simmons, 1992; Quatroche, Bean, & Hamilton, 2001). This chapter provides the context and details of the approaches Sara, Grace, and Lisa used to facilitate professional development. The data analysis led to four key categories for the facilitator role for teacher leaders: (a) initial vision of facilitation, (b) re-imagining the facilitator role, (c) enacted approaches of facilitation, and (d) reflection on facilitator experience.

**Context of the ISA Book Study in Weston School District**

The teacher leaders facilitated the ISA book study in two locations within the district: Riverside Primary and the intermediate building. The attendees, setting, and number of sessions differed at each location. One or more district administrators attended each observed ISA book study session in the district.

At Riverside, an average of 35 teachers and teaching assistants in kindergarten through second grade attended five of the observed ISA book study sessions. The district used the Riverside cafeteria for the book study, a room big enough to accommodate all the classroom teachers. The classroom teachers sat at long cafeteria tables facing a large projection screen. At the intermediate building, an average of 12 special education teachers and their teaching assistants attended the two observed ISA book study sessions. Held in a classroom, the teachers sat in desks again facing a projection screen. See Appendix F for a detailed outline of the observed ISA book study sessions in Weston School District.
Intended Approaches of Facilitating the ISA Book Study

The ISA book study developers designed materials and created resources to support teacher leaders as they independently facilitated the book study in their schools. These tools are not mandated for teacher leaders or districts to use; rather they are recommended by the ISA book study developers to align with structure and content of the EIRD. Samples and descriptions of these resources are located in chapter six.

The Weston School District administrators intended for the teacher leaders to follow the ISA book study resources and guidelines. A district administrator stated: “We attended the workshop and wanted our teacher leaders to follow the guidance and facilitators guide given from (ISA developer) to make the ISA book study successful at Riverside” (interview 2, 4/17/2015). This administrator explained how she wanted teacher leaders to use the ISA facilitators’ guide to support the implementation of ISA book study. Sara affirmed the district intentions stating: “We knew that (district administrator) wanted us to use the facilitators’ guide for the ISA book study and I was happy to have this because I didn’t really know how to start facilitating discussions and this gave us a starting point about what we needed to cover” (interview 4, 4/17/2015). Sara understood the district’s rationale for using ISA resources and recognized how these resources might help her to facilitate conversations. Sara, Grace, and Lisa each brought a unique perspective to the ISA book study, leading to some differences in how they facilitated. The following sections describe each teacher leader’s initial vision of facilitating the ISA book study followed by their enacted approaches as facilitators.
Teacher Leader as Facilitator: Sara

Throughout her teaching career, Sara participated in and contributed to multiple professional development events in Weston School District. Interviews with Sara and her district administrators recalled how she had previous experience presenting at grade-level, faculty, and reading department meetings, in addition to serving on building and district committees (Appendix L, Interviews 3 & 4). For the first time in her career Sara held the positions as both a reading teacher and literacy coach, while also continuously planning, organizing, and facilitating professional development for her entire school building.

Initial vision of facilitation. Sara attended the ISA workshop intending to support Riverside implementation of the ISA. She described her initial vision in an interview toward the end of the school year: “I clearly thought people would sign up if they are interested. I thought it would be like five people and I thought people would get compensated to stay after school with the grant money. So, I was hoping that no one would do it that didn’t want to. I thought teachers were going to be paid to be members of the book study” (interview 4, 4/17/2015). Sara envisioned teachers having the option of attending the ISA book study after school and thought those who attended would receive stipends funded by the STLE-3 grant. She imagined leading discussions with a small group of teachers who chose to participate in the ISA book study. Sara also stated: “Like in my mind I thought I would be in the book nook (library)…. I didn’t know that it would be the whole faculty so I kept seeing myself sitting in a group with the book watching videos. That is what I saw in my mind. So, it is completely different than I thought” (interview 4, 4/17/2015). Sara initially visualized facilitating the professional development with a small group of faculty members in their school library, not the entire school. The following section explores how Sara re-imagined her role of facilitating teacher learning.
Re-imagining the role of a facilitator. Sara’s facilitation differed from her original vision in several ways. Sara believed she would facilitate a book study for EIRD with a small group of teachers who chose to attend the sessions. Instead, at the start of the school year, the district informed Sara that she would facilitate the ISA book study with Grace for all of the teachers at Riverside. Sara stated: “I literally learned about my role for doing PD in August. I was like, this is a big deal because it was the whole school. So, I needed to plan before school even started” (interview 4, 4/17/15). Sara explained how her vision shifted from a small group of teachers to the entire school. A district administrator explained this implementation process: “We wanted the whole school to just focus on this one PD. We didn’t want everyone learning different things, so we required everyone to attend the PD at the same time to get the same information, from the same lead facilitators” (interview 3, 5/11/15). The district administrators intended for all of the classroom teachers at Riverside to all attend the ISA book study to develop consistency of content and congruency of language from the same facilitator.

Sara realized her initial vision of teachers choosing to participate in the ISA book study differed from the district administrators’ vision. The district administrators based the ISA book study sessions on the designated dates of faculty and professional development meetings scheduled in the school calendar. Therefore, the district already contractually required Riverside teachers to attend the scheduled dates of the ISA book study. However, all Riverside teachers were encouraged, not required, to read the EIRD. A classroom teacher stated: “We all had to attend the ISA book study and we were all given a copy of the EIRD, but we needed to read the book chapters outside of the school day. Sometimes I was too busy to read it so I would go the book study without having done my homework” (focus group 1, 6/23/15). This teacher explained that by not being required to read the EIRD, some teachers did not feel obligated to
read the book at all. Sara stated: “It was hard because we couldn’t force anyone to read the book. Everyone had the book. But we didn’t really know if they read the chapter, so we had to present with the mindset that some people didn’t read it, because, like, we didn’t know” (interview 4, 4/17/15). As both the classroom teacher and Sara indicated, there was a mismatch between Sara’s vision of the ISA book study and the classroom teacher’s vision. As a result, Sara developed specific approaches to facilitate teacher learning due to the challenge of planning for a large group of teachers who may or may not have read the associated content.

**Enacted approaches of facilitating.** Sara continuously used modeling to support her colleagues’ understanding of the ISA. Modeling involved demonstrating small-group lessons showing the faculty how to use ISA-related materials and resources in their classrooms. To engage the audience, Sara modeled her strategic use of language and memorable activities to keep her audience active as listeners and learners during the ISA book study sessions. In the following sections, I show how Sara facilitated the learning of teachers at Riverside.

**Modeling lessons and resources for ISA.** The ISA developers intended for ISA book study facilitators to use resources from the accompanying website. Specifically, the ISA book study developers intended for teacher leaders to access short videos from the website of teachers and students engaged in ISA lessons. Sara initially used this resource and then started to shift her thinking about ways to demonstrate ISA lessons. Sara stated: “I just thought that teachers needed to actually have the materials in their hand and practice with their peers. I know as a teacher I would want to bring back the content to my classroom and if I practiced it first and understood it” (interview 4, 4/17/2015). As an experienced classroom teacher, Sara stated that her audience would need to transfer the ISA back into their classroom. In addition to showing some of the ISA instructional videos from the website, Sara also modeled ISA lessons during the
ISA book study sessions. During one professional development session, Sara stated: “I want you to listen to how I introduce this strategy to my pretend student and watch how I would model it first” (observation 4; 3/27/15). In this example, Sara modeled how to introduce an ISA strategy for the Riverside teachers.

Sara invited Riverside teachers to observe while she modeled lessons for the school. During a professional development planning session, Sara contacted a classroom teacher and asked the teacher to participate in activities during the ISA book study beforehand instead of asking for participants during the professional development (observation 3, 11/12/14). A first-grade teacher reflected on Sara’s facilitation stating: “Sara made the PD come alive. She always called on faculty to act like students and practice the ISA strategies and bring us copies of the materials to use in our classroom, but modeled how we would use them first” (focus group 3, 6/25/15). This teacher appreciated Sara’s modeling approach because it made the content applicable to immediately implement in the classroom. For example, during an observation of the ISA book study session three classroom teachers pretended to be students as Sara introduced one of the ISA strategies. She explained how to use the strategy while reading a page from a big book. Sara then asked each of the three teachers to read a page and practice using this strategy to identify a word she previously covered up with Post-it Note (Appendix F; observation 4). This example shows how Sara provided alternate ways for the Riverside teachers to envision the ISA lessons in practice through her approach of modeling.

Engaging teachers during ISA sessions. In addition to modeling, Sara worked on engaging teachers during her facilitation of the ISA book study. She recognized the need to extend activities so audience members could better transfer their new learning of content into practice. Initially, Sara directly followed the facilitators’ guide. She later started to shift her
planning to focus on engaging her audience. Sara stated: “The PD was always after school hours so everyone was already tired and we needed to wake them back up and get them excited, because I’m excited about this. I needed to shake things up or I would lose them” (interview 4, 4/17/2015). Sara understood how the teachers’ learning may be impacted by their schedules, so she recognized a need to keep engaging teachers in learning the content.

As a facilitator, Sara adapted the resources provided from the ISA book study developers to engage the Riverside Primary School teachers and meet their teaching needs. For example, the ISA book study developers intended for facilitators to keep repeating the phrase: “Let the letters go” in relationship to understanding phonological awareness. To engage the audience with this phrase Sara chose to play a song titled, “Let it go” (observation 7, 12/12/2014). As a result of playing the song and leading the discussion on “Let the letters go” the teachers recalled this content throughout the year. A kindergarten teacher stated:

Sara is always so positive and excited about the ISA, which gets me excited, too. Like I remember when she played “Let it go” and I always think about that when I’m doing my PA (phonological awareness) testing. I get so stuck on the letters and need to let it go.

(focus group 1, 6/23/2015)

Sara’s approach of engaging her audience made an impression on this teacher as she recalled this event six months later and recognized how this ISA content applied to her teaching. Another example shows how Sara adapted the ISA resources to engage classroom teachers. To engage the teachers in the ISA topic on vocabulary and oral language she invited all teachers to vote on a term Riverside could use when introducing, recognizing, and reflecting on vocabulary. A kindergarten teacher reflected on Sara’s facilitation regarding this topic:
We all were part of the decision so everyone wanted to use this phrase (juicy words).

Another teacher would catch my students using “juicy words” or the principal; everyone in the building was aware of the vocabulary we were using and the students were building their vocabulary, which was the most important part. (focus group 3, 6/23/2015)

This teacher valued being part of the decision to build the vocabulary in the school community. She also felt that the entire staff recognized the importance of using these “juicy words” to encourage all students. The ISA book study developers did not necessarily intend for teachers to use a phrase such as “juicy words” to build students’ vocabulary and oral language, and Sara adapted this so the entire school community could actively engage in this instructional goal.

In the beginning of the year, Sara only showed instructional videos from the developers of the ISA book study. Sara later modeled her lessons during the ISA book study session. As the school year progressed, Sara recorded her own teaching on video. She used the technology supplied from the STLE-3 grant to record her teaching on iPads and edited the content. The district required Sara to create videos as a teacher leader and literacy coach and Sara strategically chose to create videos with the students at Riverside that would support teachers’ understanding of the ISA. While she still showed the ISA videos to the audience, she also included videos of herself modeling the ISA with her students. A second-grade teacher stated:

I give Sara a lot of credit for showing videos of herself teaching. I hate being videotaped.

She is brave to show it to the whole school and it helped me to see how she set-up the ISA materials and worked with students. (focus group 4, 6/25/2015)

This teacher engaged with Sara’s videos because of the familiarity of students, and learned from Sara’s modeling how to design her instruction using ISA materials and resources.


Reflecting on Sara’s experience as a facilitator. Sara continuously reflected on her role as both a teacher leader and facilitator. Sara facilitated her colleagues’ learning by modeling instructional practices and video recording her own teaching. She also created interactive activities to engage the Riverside classroom teachers in the book study content. As a facilitator, Sara supported teachers’ implementation of the ISA by modeling ISA lessons, providing resources, and engaging teachers during the ISA book study sessions.

Teacher Leader as Facilitator: Grace

As a reading teacher for nine years in Weston School District, Grace had experience planning and providing professional development. Grace previously organized faculty meetings at the intermediate building and planned professional development for a different school district on how to administer a reading assessment. The new position was the first time Grace worked as a reading teacher and literacy coach, while also continuously planning, reflecting, and facilitating professional development of one school building. However, Grace’s experience as a facilitator would be the first time she worked with all of the teachers at Riverside Primary.

Initial vision of facilitation. Initially, Grace did not think she would be a facilitator for the ISA book study at Riverside. For example, at the ISA summer workshop Grace thought her role was to take sections from the ISA book study content and share it with the teachers at her intermediate (grades 3-5) building. Grace explained:

I was almost waiting for the part where like it fit for (intermediate building), and when I go back and look at my EIRD book all my Post-it Notes were, oh this is good for (intermediate building), so I felt I had a very different perspective. (interview 6, 4/17/2015)
Grace did not have a clear vision initially of her role as facilitator of the ISA book study. She attended the ISA workshop with the intention of implementing the content in only her intermediate building. Grace’s notes in the participants’ resource booklet from ISA summer workshop focused on content she planned to share with intermediate teachers. Appendix K is a sample of Grace’s notes from her ISA participants’ resource booklet. As shown in her notes, Grace identified specific teachers in the intermediate grade level who would benefit from some of the ISA content and also stated in the margins what she would like to try in her position as a literacy coach at the intermediate building. Since the ISA book study focuses on preventing early reading difficulties (i.e., in grades K-2), Grace was shifting her thinking throughout the summer workshop with the vision of facilitating this content with teachers at the intermediate building.

**Re-imagining the role of a facilitator.** Grace’s initial vision of facilitating the ISA book study at the intermediate building changed in late August (2014). District administrators informed Grace that she would lead the ISA book study at Riverside. A district administrator stated: “It made sense for Grace to be at Riverside, because of her experience leading PD. We wanted a lead facilitator who had this experience already and we already invited her to be a literacy coach. So, we asked her to join Sara with facilitating” (interview 3, 5/1/15). This administrator described Grace’s experience leading professional development and her title as a literacy coach supported the district’s choice for her to lead the ISA book study at Riverside. Grace learned about her location and audience after attending the ISA summer workshop, which changed her intended vision as both a learner and facilitator.

As a teacher at the intermediate building, Grace needed to commute to Riverside Primary to implement the ISA book study. This commute required her to plan ahead so that she could
have time to drive to the school building and prepare for the ISA book study. Grace stated: “It wasn’t a long drive, but it was just one more thing I needed to do and I needed to have everything with me, because it’s not like I could run in my classroom and grab something if I forgot” (interview 5, 4/17/15). She reflected on how the location of the ISA book study influenced her routine and preparation. In contrast to what she previously envisioned, she would facilitate the ISA book study with primary classroom teachers at a different school location.

As an intermediate reading teacher and former intermediate classroom teacher, Grace needed to shift her thinking about working with the primary teachers at Riverside. Unlike Sara, she did not have a rapport previously built with her audience. A classroom teacher reflected on Grace’s presence: “I’ve seen Grace at other district events, but this was the first I’ve been at a PD led by her. I see Sara all the time so it was nice to learn from someone new who sees my students in a couple of years” (focus group 2, 6/23/15). This teacher recognized Grace provided new teaching ideas and a different voice from the teachers at Riverside. Working with the teachers at primary Riverside led Grace to think differently about the way she prepared. Grace stated: “So if I had gone into the summer knowing my role I probably would’ve had a different perspective when I was there” (interview 6, 4/17/2015). Having information about the grade level and location for the professional development she would be providing may have changed the way in which Grace engaged in the ISA workshop.

**Enacted approaches of facilitating.** Grace continuously used two distinct approaches of designing and reflecting to support her colleagues’ understanding of the ISA. Designing involved using prior knowledge from the ISA workshop and thinking about the audience needs to develop each presentation slide. There was a lot of reflecting and discussing to construct each presentation slide to support the learning of her primary-level colleagues. The approach of
reflecting involved Grace in implementing tools so teachers could closely examine their instructional practices. Each of these approaches are further examined below to understand different approaches to facilitating teacher learning.

**Designing ISA presentation slides.** Initially, the teacher leaders at Riverside showed instructional ISA videos at the book study sessions as they discussed each topic (Appendix F; observations 1 & 2). During one of their planning sessions, Grace recommended to Sara that they should design their own presentation slides honoring the content of the ISA book study developers, and connecting it to the specific instructional needs of teachers at Riverside (Appendix G; observation 4). Grace explained:

> I felt and I had done presentations in the past, so I kind of felt that I had that experience that when I stood up in front of people enough to know when they are glazed over, and if I’m going to stand up and present something and if I am bored with what I am presenting, I could see it and feel it too. At first, we stuck with the format that (ISA developer) gave to us, but then we realized it just wasn’t working with this group. If it was a smaller group, but it was the whole building. (interview 6, 4/17/2015)

Grace realized she needed to shorten the length and modify the slides to fit the allotted time provided by the district. Grace designed new slides to make the information relevant and specific to current issues in the building (Figure 16). For example, a first-grade teacher stated: “I knew they (Sara and Grace) listened to our questions, because the next time we met the answers to our questions were on their slides for the whole group” (focus group 3, 6/25/2015). This teacher recognized how Grace redesigned the slides and responded to the needs of the school community.
Grace redesigned several slides and added her notes at the bottom of the page. For example, in Figure 16 she wrote notes regarding where she would lead the discussions and where Sara would present. This information provided a window into the collaborative process of designing the slides and how Grace negotiated how she would facilitate specific content during the ISA book study. Grace’s redesign of the slides was responsive to the instructional needs of classroom teachers and also increased collaboration among the teacher leaders.

**Reflecting on the ISA sessions.** In addition to creating individualized slides, Grace created a tool that allowed classroom teachers to reflect on their learning from the ISA book study and inform future ISA book study sessions. Grace commented on her previous experiences facilitating professional development sessions stating: “I used to use exit tickets with my
students for feedback and then I would do the same after I led PD sessions. It just gave me quick feedback to help plan future lessons” (interview 5, 4/17/15). Exit tickets are pieces of paper with short questions to gather reflective feedback such as: “What did you learn today?” or “What questions do you still have?” Grace chose to incorporate this reflective tool into the ISA book study sessions. She commented: “At first no one was asking questions, so we needed to find a confidential way to get feedback from the group” (interview 6, 4/17/2015). During one of their planning meetings, Grace drew on her previous experience leading professional development and provided Sara with examples of exit tickets. Together they designed questions to gather anonymous feedback and reflections from the classroom teachers at Riverside.

At a later planning meeting, Sara and Grace read the completed exit tickets with district administrators and reflected on the classroom teachers’ responses (see Appendix H; observation 8). This approach for reflection helped in planning future ISA book study sessions and understanding different ways to support teachers’ learning. Grace stated: “One of the exit tickets asked us to bring more materials for the teachers to take back and use in their classroom” (interview 5, 4/17/15).

Grace learned through the approach that teachers were more likely to engage and complete reflective exercises when the teacher leaders and district administrators followed through on the specific questions and needs of the classroom teachers. A district administrator affirmed that this approach supported the implementation of the ISA by stating: “The teachers’ feedback was crucial in helping Sara and Grace plan the PD. Teachers asked for copies of resources so we helped Sara and Grace make packets of resources for the teachers” (interview 3, 5/11/15). This administrator also recognized the importance of being responsive to the teachers’ reflective feedback.
The success with the exit tickets from the ISA book study sessions led to Grace creating a summative Google Survey at the end of the school year for teachers to provide feedback on the implementation of the ISA book study. One of the questions in the survey read: “Please check three areas below that are the highest priority for you to receive more information on.” (See Figure 10 in chapter five for the full survey.) This survey question helped the facilitators and the district administrators understand areas where the teachers at Riverside needed more support. A second-grade teacher commented: “I like the survey because it was quick and helped me share what I needed more support with, without putting my name on it” (focus group 4, 6/25/2015). This teacher appreciated having an anonymous platform to share feedback with the teacher leaders.

As a teacher in the intermediate building, Grace needed to learn more about the needs of teachers at Riverside. Grace stated: “I needed to have a pulse of the building in order for them to trust me and see what I was working with. I wasn’t there every day like Sara or Lisa. I needed to hear more of what the Riverside teachers wanted and needed and I think that exit tickets helped us to do that” (interview 5, 4/17/2015). Grace focused on the needs of the audience by providing opportunities for reflection. In doing so, she built a relationship with the audience by honoring and attending to their reflections.

**Reflecting on Grace’s experience as a facilitator.** Overall, Grace used the approaches of designing ISA presentation slides and reflecting on the ISA sessions to create intentional and meaningful opportunities to build a professional learning community. The approaches Grace used to facilitate involved being responsive to her audience needs by continuously reflecting and changing her presentation. While the ISA book study developers created instructional videos with slides for facilitators to use, Grace realized she needed to refine her presentation to address
questions and comments from the Riverside classroom teachers. She also included reflective tools as a way to promote conversations with the classroom teachers based on their feedback.

**Teacher Leader as Facilitator: Lisa**

As a first-grade teacher for over ten years, Lisa attended professional development meetings and workshops led by outside experts or colleagues in her district. Based on interviews with district administrators, Lisa had experience leading committees and representing her first-grade colleagues at district meetings. This was the first time Lisa took on a new position as a reading teacher, while also continuously reflecting and facilitating professional development at Riverside. As a facilitator, Lisa supported teachers’ learning during the professional development sessions.

**Initial vision of facilitation.** Lisa did not envision leading the ISA book study as a facilitator. She stated that her purpose for attendance at the ISA summer workshop was to build her knowledge of early literacy to support her new position and teacher learning. Lisa reflected:

> I was so excited to be there! I just thought that the district sent me because they wanted me to have more knowledge of early literacy since it would be my first year as a literacy specialist. I knew I would need to work with teachers as a facilitator, but I didn’t think I would be standing up in front of the school building like Sara and Grace. (interview 5, 4/17/2015)

Lisa understood that while she would help facilitate the ISA book study, she would not have the same involvement as Sara and Grace when implementing the ISA book study at Riverside. Lisa described her initial vision of a facilitator as:

> I really feel it’s just what I am learning. It’s bringing it back and sharing it with my grade level and that promotes really natural ways to have discussion. In terms of having my
colleagues come to me and say, ‘you know you mentioned this; I’m interested in that.’

(interview 5, 4/17/2015)

Unlike Sara and Grace, Lisa worked with one grade level in her position as a reading teacher. She associated a facilitator’s role with supporting an individual grade level not the entire school community.

**Re-imagining the role of a facilitator.** The district administrators’ intentions with regard to Lisa’s role as facilitator closely aligned with her initial vision of facilitating. As a facilitator, Lisa supported the nine first-grade teachers at Riverside in integrating the ISA into their literacy instruction. Lisa facilitated the first-grade teachers’ literacy practices in multiple ways. Throughout the study, Lisa began to push into classrooms to co-teach and model ISA lessons. For Lisa, co-teaching included working with the teachers to plan whole- or small-group lessons and interactively teaching them together. The first-grade teachers observed and took notes on her language and instruction.

The first-grade teachers interviewed in this study recognized the importance of having a facilitator with extended knowledge of the ISA, and also one who had experience teaching in first grade. Lisa’s experience highlighted that facilitating teacher learning can also involve providing individualized or collaborative support and was not limited to leading professional development. Lisa commented on her experience with one grade level: “I do think that because of my familiarity with my colleagues as both the teacher leader role and the reading specialist role I’ve been able to be both proactive and reactive as a facilitator, because I know my team” (interview 5, 4/17/2015). She explained that her previous relationship with the first-grade team of teachers helped her facilitate their learning. A first-grade teacher confirmed: “I trust Lisa. She knows first grade. I like it when she comes in my room to model lessons or sit with us at the
PD and help us think about how we can try the ISA” (focus group 3, 6/25/2015). This first-grade teacher felt comfortable inviting Lisa into her classroom and learning from her because of Lisa’s history and expertise in first grade.

**Enacted approaches of facilitating.** In addition to co-teaching in first grade, Lisa developed two specific approaches for facilitating teacher learning: leading small groups and connecting. Lisa used these approaches during the ISA book study sessions and in her position as a reading teacher.

**Leading small group discussions during ISA sessions.** As referenced in Appendix F, Lisa attended all ISA book study sessions led by Sara and Grace. During each of the ISA book study sessions, Lisa engaged as both a participant and an informal leader. For example, Sara and Grace planned for whole group discussions and Lisa led the small-group conversations. Leading small groups included keeping participants focused on the topic and encouraging teachers to reflect on the ISA. Lisa stated:

> I just felt it was important to monitor group discussions, or else everyone would get off task. I would encourage teachers to use their participants’ resource book. I would always bring my book (EIRD), which is full of Post-it Notes to show the other teachers how I was using it. I helped them (the teachers) to reflect and focus their discussions so when we came back to the whole group people felt they had something to share with everyone. (interview 5, 4/17/2015)

Lisa referred to the EIRD as a resource to model how engaged she was in the content. Figure 17 shows her engagement with the EIRD through the use of multiple Post-it Notes to mark pages and record her thinking. As shown in Figure 17, Lisa utilized this book frequently to support her learning. Lisa recognized a need to support teachers’ learning of the ISA by sitting side-by-side
to listen and guide conversations. She also showed teachers how she was using the materials to foster her own learning.

A clear example of Lisa leading small-group discussions occurred during observation 7 (Appendix F; 12/5/2015). During this ISA book study session, Sara and Grace led a topic on Phonological Awareness and asked (K-2) teachers to sit at three tables divided by grade level. Sara and Grace provided the teachers with materials to practice using Elkonin boxes with their grade level. At the first-grade table, Lisa sat with the nine teachers and joined in and helped to focus their discussions. Some the language she used prompted discussions and reflections: “When do you think we could use these during the literacy block?” and “I remember using these when I began teaching first grade. These are still just as important to help students and help me
assess their knowledge of phonemes” (observation 7, 12/5/2015). In these interactions, Lisa included herself in the discussions using phrases such as “I began teaching first grade …” to remind teachers of her previous experience. She also used the word “we” to help teachers understand that she was working with them. During this time, she rotated among the first-grade team asking if they had any questions, confirming their actions, and keeping their focus on the Elkonin boxes using this intentional language.

While Lisa worked closely and had a strong relationship with the first-grade teachers, the kindergarten and second-grade teachers also recognized how her presence and language extended their learning. For example, a kindergarten teacher stated: “Lisa was side-by-side with us at the PD. I knew she went with Sara to the ISA training. So, if I had a question I knew I could ask her too” (focus group 2, 6/23/2015). This teacher appreciated how Lisa integrated her knowledge of the ISA content into small-group discussions while providing a safe space for questions to foster new learning.

**Connecting the ISA to teaching.** To support participants’ understanding of the ISA content, connecting became an approach Lisa used to support the lead facilitators (Sara and Grace). Connecting is an approach that directs classroom teachers to apply the ISA content to their own instructional practices. Sara recognized Lisa’s approach of connecting the ISA to teaching as a successful way of enhancing teacher learning. Sara stated:

Lisa helped focus the teachers on the topic when we lost them. When it was crickets (silence) at the PD sessions, she would always have a question/comment. And it was good because she went to the same ISA summer workshop, so she had the background and gave a different perspective if Grace and I weren’t making it clear. (interview 4, 4/17/2015)
Sara recognized the importance of Lisa sharing her knowledge, asking questions, and prompting discussions.

As a practicing reading teacher, Lisa also interacted with the students in reading groups. She observed, instructed, and documented the literacy growth of students engaging in ISA-based instruction. Lisa stated: “A student in my reading group would say ‘I use that strategy in my class,’ and I knew that teacher was using ISA. I talked to that teacher about ways to use the ISA strategy chart in her reading groups” (interview 5, 4/17/2015). Lisa realized the classroom teachers were implementing the ISA into their instruction, because the students she saw during her reading groups were using the same language and practices associated with the ISA.

The ISA book study developers created guiding questions and prompts for facilitators to use. Lisa referred to these resources to enhance her guiding approach. Lisa stated: “I always looked back at the resources from the summer workshop. I had them every PD session and knew to look back if I needed to stir up the conversations” (interview 5, 4/17/2015). Lisa recognized the need for resources to initiate/extend conversations and guide the learning of the school community. She also described the importance of directing participants’ attention on the lead facilitators’ presentation, content, and importance of integrating the ISA into their instructional practices.

**Reflecting on Lisa’s experience as a facilitator.** As a facilitator, Lisa was attentive to questions and confusions of the school community and addressed these through interactive discussions. She led small-group discussions and connected the ISA to teaching as approaches to facilitate interactive discussions and reflections with teachers. Lisa actively listened as a participant and strategically listened to the participating teachers’ conversations and questions. She learned to lead discussions with teachers by selecting specific language and prompts to
support their understanding of the ISA. In addition, she helped Sara and Grace intentionally connect discussions on early literacy instruction to the instructional goals of the ISA.

**Responsive Teacher Leaders**

The ISA book study developers and district administrators understood the importance of selecting practicing teachers to facilitate the ISA book study. As a result, the classroom teachers began to recognize Sara, Grace, and Lisa as credible sources to enhance their teaching practices. Therefore, the history and experiences of these teacher leaders enhanced the approaches they developed as facilitators. Additionally, the interactions teacher leaders had with the ISA developers and the school administrators also influenced how they facilitated. Sara, Grace, and Lisa utilized materials to align with the intended visions of facilitators from both the ISA developers and the district administrators. At the same time, they also revised these intended visions and provided materials in response to the questions their colleagues posed related to early literacy and the implementation of the ISA into their instructional practices.

The teacher leaders continuously revised their approaches to facilitating teacher learning over time based on their observations and the feedback from participants. Overall, the teacher leaders used multiple responsive approaches to facilitate professional learning such as: modeling lessons and the use of resources for the ISA, engaging teachers during the ISA sessions, designing ISA presentation slides, reflecting on the ISA sessions, leading small-group discussions during the book study, and connecting the ISA to teaching. These approaches helped the teacher leaders to build a varied rapport in order to support teacher learning. Grace explained the importance of investing in the content with their colleagues:

Sara and I are in the trenches with them and I think that’s a big deal because we’re not just some outside person who comes in and talks about how great they are. We’ve had
that so many times and people can’t make connections, because I’ve left PD with people saying ‘well, isn’t she just perfect,’ and so I think that the fact that we’re sharing how we’ve grown and evolved is really important as well and it’s not a once and done.

(interview 6, 4/17/2015)

Grace recognized how sharing experiences for integrating the ISA into her own instructional practices helped make the material accessible and showed the teachers the practicality of the content.

The approaches Sara, Grace, and Lisa used as facilitators led teachers at Riverside to start thinking about the possibilities of shifting their instruction. For example, a kindergarten teacher stated: “They were using the ISA with their own students, so I knew it was important and worthwhile if they saw success in the students who were struggling the most with reading” (focus group 1, 6/23/2015). This teacher confirmed the importance of learning how facilitators also engage in the instructional practices discussed during professional development. Interviews with K-2 teachers revealed how the school community worked to build congruency in their instructional language and practices related to the ISA. For example, a first-grade teacher stated: “Everyone has the ISA strategy charts and we are using ‘juicy words’ in our classrooms. Some of us even did a demolition day to re-arrange our rooms and create a more ISA friendly room” (focus group 2, 6/25/2015). This teacher identified how the implementation of the ISA book study transformed the classroom spaces to reflect how they integrated their new learning into their teaching. These changes resulted from their engagement with the ISA book study and the teacher leaders facilitating the ISA book study.

In summary, the approaches and experiences of teacher leaders facilitating teacher learning differed yet still remained focused on the goal of enhancing early literacy instruction.
Sara, Grace, and Lisa all identified the need to be responsive facilitators and intentionally guide conversations to support teachers’ professional learning. These conversations can – and did – lead to conversations on how to change instructional practices. Sara, Grace, and Lisa re-directed this school community to think about early literacy instruction and teacher leadership in the context of increasing the professional learning of others.
CHAPTER 8

Discussion and Implications

Educational research has identified a need for clearly defined expectations and qualifications of teacher leaders and specialized literacy professionals to enable a better understanding of the complexities of these positions (Bean et al., 2015; Calo, Sturtevant & Kopfman, 2015; Galloway & Lesaux, 2014; ILA, 2015). This case study provided a close examination of three specialized literacy professionals from one school community and their unique experiences in formalized teacher leadership positions. Given the findings, three important conclusions emerged from this study to inform the research on specialized literacy professionals in leadership roles: (a) stakeholders’ visions of teacher leadership framed the roles and responsibilities of teacher leadership positions; (b) on-going professional development, web-enhanced learning tools, and administrative guidance were critical to support and prepare professionals for teacher leadership roles; and (c) professional expertise influenced how the teacher leaders facilitated teacher learning.

Visions of Teacher Leadership

Over the past two decades, district administrators have invited specialized literacy professionals to step into leadership roles and provide learning opportunities within their area of expertise (Darling-Hammond & Sykes, 1999; Dole, 2004; Galloway & Lesaux, 2014; Quatroche, Bean, & Hamilton, 2001). The expectation for specialized literacy professionals to engage in leadership responsibilities is documented in the Standards for Reading Professionals (IRA, 2010) and the ILA (2015) position statement for specialized literacy professionals. The specialized literacy professionals in Weston School District engaged in multiple leadership roles as professional development providers, curriculum developers, co-teachers, and communicators.
The findings suggest the initiatives adopted by this district helped to frame the roles and responsibilities of these specialized literacy professionals.

District administrators situated the way this school community defined teacher leadership through the implementation of the STLE-3. One way this grant framed the roles of leadership was through the formalization of teacher leadership positions. In the selection process for district level teacher leaders, district administrators valued the extensive teaching experience and/or background in literacy instruction of Sara, Grace, and Lisa. Implementation of their formalized teacher leadership positions empowered Sara, Grace, and Lisa to recognize their district administrators valued their current practices and actions.

As part of the STLE-3 initiative, teacher leaders engaged in professional learning opportunities that continued to frame their understandings of teacher leadership. For example, district administrators designed professional development specifically for teacher leaders. The teacher leaders’ engagement in these professional learning opportunities as part of the grant initiative created collaborative experiences with district administrators. This professional development attempted to unite teacher leaders within the district and build a common vision of teacher leadership. Sara, Grace, and Lisa also participated in the ISA professional development summer workshop to prepare as facilitators of the ISA book study.

Classroom teachers at Riverside reflected on the professional development sessions, content knowledge, and instructional practices Sara, Grace, and Lisa engaged in as teacher leaders. The classroom teachers’ reflection identified their understandings of the qualities associated with their districts definition of teacher leadership. Since district administrators selected a small number of educators to offer formalized teacher leadership positions, some classroom teachers questioned the administrator’s selection process.
Reflections from the Weston School District school community suggest that the development of teacher leadership positions can influence a school community’s vision of teacher leadership. For examples, the findings showed how the Weston School District administrators and the three specialized literacy professionals in teacher leadership positions identified differing characteristics for teacher leaders. Sara, Grace, and Lisa’s experiences illustrate how district initiatives influence the evolution of teacher leaders’ roles and responsibilities. The multiple versions and visions of teacher leadership in Weston School District offer an example to support Bean et al.’s (2015) call for clearer definitions and descriptions of specialized literacy professionals’ leadership roles.

**Support and Preparation of Literacy Leaders**

Educational policymakers and state initiatives emphasize the importance of teachers’ quality and effectiveness (Bean et al., 2015; Goe, Biggers, & Craft, 2013; U.S. Department of Education, 2014). Many initiatives implemented by districts impact the positions and responsibilities of teachers and specialized literacy professionals. In the context of this study, the STLE-3 grant provided teacher leaders with structures and resources to support their roles and responsibilities. The teacher leaders identified how the on-going learning opportunities enhanced their leadership skills. Specifically, the teacher leaders all recognized that attending the ISA summer workshop first and the teacher leadership professional development throughout the school year supported them as learners and leaders. The experiences of these teacher leaders strengthen the research and frameworks suggesting teacher leaders’ need to continuously engage in multiple pathways of learning (Calo et al., 2015; ILA, 2015; Snell & Swanson, 2000; Teacher Leadership Competencies, 2014; Walpole & McKenna, 2013).
The teacher leader planning and facilitation sessions for the ISA book study provided insight to the structures and resources most helpful to Sara, Grace, and Lisa as learners and leaders. As the findings indicate, the teacher leaders spent significant time planning the ISA book sessions. At their planning sessions, the teacher leaders continuously referenced their EIRD book, ISA website, and notes from their participants’ resource booklet, and the ISA facilitators’ guide. As a new endeavor for the teacher leaders, these multiple resources supported the decision-making process. The teacher leaders developed strategies to select, read/view, process, and purposefully plan for the ISA book study sessions. For example, they navigated the ISA website to watch multiple instructional videos of ISA lessons and recordings of the ISA developers’ disseminating content from the EIRD book. The teacher leaders’ decision-making conversations to consolidate these resources suggest a need for extended planning time, perhaps as typical for many people in new positions (Bullough & Knowles, 1990; Crosswell & Beutel, 2017; Mutton, Hagger, & Burn, 2011).

The findings affirm the research on the importance of on-going learning opportunities and suggest the need to prepare specialized literacy professionals to negotiate the resources provided from multiple stakeholders (Bean et al., 2015; ILA, 2015). For example, as one of their accessible resources, the ISA developers provided teacher leaders with numerous instructional videos intended to be shown at the ISA book study sessions. Simultaneously, the teacher leaders had technology resources funded through the STLE-3 grant to support their facilitation of the ISA book study, with a requirement to create flipped videos. The findings suggest the district requirement for the teacher leaders to create instructional videos, participate in teacher leadership professional development, and engage with ISA content all influenced the teacher leaders to create their own ISA instructional videos. During their facilitation of the ISA book study, the
teacher leaders chose to show both the videos from the ISA resources and the videos they created to engage classroom teachers. Sara, Grace, and Lisa’s goal was to show examples of how to implement the ISA into practice focused on children in their school and district. Similar to other research findings, the teacher leaders had to negotiate and select multiple resources to best support the needs of their school community. However, in doing so, rather than using the ISA video resources as intended, the additional flipped video requirement led the teacher leaders to spend significant amounts of their planning time creating new videos.

In addition to professional development opportunities and web-enhanced learning tools, the teacher leaders recognized district administrators supported their developing leadership. The Weston School District administrators organized on-going meetings with the teacher leaders, participated in the ISA summer workshop alongside them, and attended the ISA book study sessions facilitated by the teacher leaders. As the findings indicate, the teacher leaders shared their plans for facilitating ISA book study sessions and received feedback from administrators at their meetings. These examples of the districts administrators’ involvement highlight the range of ways specialized literacy professionals worked collaboratively with school administrators (Bean et al., 2015).

**Influence of Professional Expertise on Facilitation**

The teacher leaders brought many areas of professional expertise to their leadership roles, such as prior experience, pedagogical knowledge, literacy content knowledge, and familiarity with local contexts. Knowles et. al, (2005) suggested the previous experiences of adults provide opportunities to make connections and interpretations with new experiences to foster their own learning. In previous studies on teacher leaders, researchers identified qualities such as instructional skills, expertise, and teaching experience as contributing factors of leadership
impacting school communities (Snell & Swanson, 2000; Stone, Horejs, & Lomas, 1997).

Specifically, Stone et al. (1997) determined extensive teaching experience, such as ten or more years in the classroom, strengthens teacher leadership skills. These previous conclusions on the importance of professional expertise all align with the ILA’s proposed standards for preparing specialized literacy professionals (ILA, 2015).

As the findings indicate, the teacher leaders drew on their expertise to inform their leadership roles. They also integrated their new learning/resources from professional development sessions into their facilitation responsibilities. The findings provide several examples of how teacher leaders’ professional expertise and on-going learning experiences helped the teacher leaders to facilitate teacher learning. As a result, each teacher leader developed a unique approach to facilitating teacher learning.

The background of these teacher leaders situated how they recognized and responded to the literacy needs of their school community as they facilitated the ISA book study. The teacher leaders noticed classroom teachers connected to content representative of their schools’ culture and climate, so they created instructional videos featuring the students at Riverside. Sara, Grace, and Lisa supplied teachers with copies of the materials such as the ISA strategy bookmark because they understood how classroom teachers valued their time and benefited from hands-on resources. These findings are consistent with the ILA (2015) position statement that emphasizes the centrality of drawing on teaching experiences to support specialized literacy professionals in teacher leadership roles. These findings also align with the Center for Strengthening the Teaching Profession (2009) three-part framework, which suggest working with adults as one of the skills needed for effective teacher leaders. The examination of the three teacher leaders from this one school community informs the research on teacher leaders drawing on their experiences.
to facilitate teacher learning (Calo et al., 2015; Snell & Swanson, 2000; Walpole & McKenna, 2013; York-Barr & Duke, 2004).

Application of Adult Learning Principles

The application of Knowles’ et al. (2005) six principles of adult learning offer another lens to better understand the complex nature of specialized literacy professionals in formalized teacher leadership positions. Knowles et al. (2005) provides specific principles for successful learning that align to current teacher leadership frameworks such as Learning Forward (2016) and the Center for Strengthening the Teaching Profession (2009). The alignment of Knowles’ et al. (2005) principles to all of these frameworks further suggests how these principles provide a foundation for leadership dispositions and support teacher leaders planning for adult learning experiences.

The following section focuses on the significance of the research findings and the implications for future research on teacher leadership theories and practices. Knowles’ et al. (2005) principles of adult learning provide a framework to further examine the findings and understand the complex nature of specialized literacy professionals in formalized teacher leadership positions.

Principle 1: Learner’s Need to Know

The first principle describes the importance of adults understanding the purpose of learning before committing to studying the content (Knowles et al., 2005). The Weston School District administrators provided Sara, Grace, and Lisa with learning opportunities to support their positions as teacher leaders and facilitators. All three teacher leaders attended the ISA workshop to prepare them as facilitators prior to implementing the ISA book study. Sara, Grace, and Lisa all confirmed that attending the ISA workshop before implementation supported them
as learners. In addition, the ISA developers offered teacher leaders resources to support their facilitation of the ISA book study. These resources helped the three teacher leaders to understand the ISA developers’ intended vision for facilitating teacher learning. The ISA resources align with Knowles’ et al. (2005) first principle of teacher leaders drawing on both the content knowledge they gained and their understandings of how to successfully implement professional development of the ISA book study.

In addition to the ISA workshop, the teacher leaders also engaged in a teacher leadership professional development designed by Weston School District administrators. The administrators used the funding from the STLE-3 grant to provide all teacher leaders within the district with equipment and access to technology experts to help them learn to use it, as well as workshops focused on enhancing their leadership skills. The findings from the study indicate that Sara, Grace, and Lisa learned from both the technology tools and the structure of the professional development. The teacher leaders’ receptivity to these learning opportunities align with Knowles’ et al., (2005) first principle that providing learning opportunities supports teachers’ understandings of their positions. As Knowles’ et al. (2005) describe, it is important for learners to understand their purpose prior to engaging in the content, as the teacher leaders did by attending the ISA summer workshop. Their experiences suggest teacher leaders benefitted from professional development prior to engaging in their positions. On-going professional development opportunities also supported the continuation of their learning and leadership.

**Principle 2: Self-concept of the Learner**

The second principle of Knowles’ et al. (2005) adult learning addresses adults being responsible for their own learning. This principle describes how adults expect others to treat
them as capable of self-direction (Knowles et al, 2005). When Sara, Grace, and Lisa participated in learning opportunities, they took charge of their own learning and the learning of their colleagues.

As Sara, Grace, and Lisa facilitated the ISA book study they initially followed the suggested facilitators’ guide created by the ISA developers. Throughout the research period, they reflected on how to address the questions and instructional needs of the classroom teachers at Riverside. As a result, the teacher leaders increased their planning time to better prepare for the ISA book study sessions. The teacher leaders’ planning time focused on developing new approaches to facilitate teacher learning. For example, the teacher leaders designed new presentation slides and edited their flipped videos to support teachers’ implementation of the ISA into their literacy instruction. The findings indicated that teacher leaders took ownership of their own learning by spending extensive time to plan professional development that met the needs of the teachers and students at Riverside.

The findings showed that the teacher leaders met with district administrators as part of the planning process for the ISA book study. At these meetings, teacher leaders discussed their feedback from classroom teachers. The teacher leaders confirmed their intended plans for the ISA book study sessions with district administrators prior to facilitating. These meetings related to Knowles’ et al. (2005) second principle of adult learning, with the administrators supporting the teacher leaders’ self-direction and facilitation of the ISA book study.

As the findings revealed, Sara, Grace, and Lisa each developed unique approaches to facilitating teacher learning. The approaches Sara, Grace, and Lisa used as facilitators helped the teachers at Riverside envision different ways of integrating the ISA into their instruction through modeling and hands-on activities. Through these experiences the classroom teachers began to
think more about the possibilities of shifting their instruction, because the teacher leaders created engaging conversations and opportunities for learning. The teacher leaders’ actions align to Knowles et al. (2005) second principle when they supported the teachers in the district as capable learners who would in turn apply new practices from the professional development sessions. These findings align with teacher leadership frameworks that emphasize the need for teacher leaders to support the learning of adults (Kentucky Teacher Leadership Framework, 2015; CSTP; 2009)

Sara, Grace, and Lisa all worked extensively with teachers during professional development sessions and in classrooms. According to survey results from specialized literacy professionals, Bean et al. (2015) found 89% of respondents indicated their roles included supporting and collaborating with teachers, requiring them to take charge of their own learning. Similarly, York-Barr & Duke (2004) analyzed determined teacher leaders take charge of their own learning through supporting adult learning and providing professional development of their colleagues. Aligning with Bean et al. (2015) and York-Barr & Duke (2004), the findings from this study signify a consistent characteristic of teacher leaders is taking charge of their own learning, and in turn, supporting the learning of others.

**Principle 3: Prior Experience of the Learner**

Knowles’ et al. (2015) third principle of adult learning focuses on the importance of connecting new knowledge to what the adult learner already knows. Adults can rely on their experiences as Knowles et al. (2005) describes to support their understanding and interpretations of new learning. District administrators selected Sara, Grace, and Lisa for formalized teacher leadership positions due to their previous informal leadership experiences of engaging with classroom teachers and providing professional development opportunities. Sara, Grace, and
Lisa’s previous leadership experiences created a critical bridge to help them learn new instructional practices.

The findings suggest that the classroom teachers at Riverside valued the previous informal leadership experiences of Sara, Grace, and Lisa. Some preferred having someone in their building they already worked with and had a relationship with rather than learning from an outside expert. Sara, Grace, and Lisa shifted their approaches to facilitating the ISA book study based on their previous experiences of providing professional development and working with their colleagues. For example, Grace reflected on her experience of designing presentation slides from previous professional development sessions to now designing presentation slides for the ISA book study sessions. The teacher leaders’ informal leadership experiences helped to prepare them for the responsibilities associated with their new formalized positions. At the same time, all three teacher leaders indicated a need for further preparation to support them all as learners.

The application of Knowles’ et al. (2015) third principle suggests informal leadership supports the learning and leading of teacher leaders. Research supports the need of specialized literacy professionals to experience informal leadership practices. These practices can help build relationships within their school community. Through these practices, teacher leaders can develop the competencies needed for leadership positions (Bean et al., 2015; ILA, 2015). This study exemplifies how informal leadership experience supports the teacher leaders’ learning, and in turn, the learning of the school community.

**Principle 4: Readiness to Learn**

The fourth principle that Knowles et al. (2005) addressed is a learners’ willingness to learn and apply a new concept or idea. Sara, Grace, and Lisa all chose to learn new content related to early literacy and leadership skills throughout the research period. Their formalized
literacy positions required them to attend the ISA book study workshop, teacher leadership professional development, and facilitate the ISA book study. Knowles’ et al. (2005) fourth principle describes the importance of being self-driven to learn the material and/or practices.

Sara, Grace, and Lisa all accepted the position of a teacher leader because each described being in a place in their careers where they needed a change and wanted more opportunities to engage as learners. For example, Lisa chose to leave her position as a first-grade teacher and become a first-grade reading teacher. Lisa wanted to learn new teaching practices focused on early literacy instruction. In addition to shifting positions, all three teacher leaders chose to learn to use new technologies for collaborating and creating videos for their colleagues.

Sara, Grace, and Lisa all identified approaches their district administrators and ISA developers provided to prepare them for specific leadership activities. This is consistent with the findings from Jacobs, Gordon, & Solis (2016) who studied critical issues of teacher leadership and identified a need for professional development focused on how to share instructional strategies and materials, assist teachers in their content areas, follow-up after initial assistance, and provide peer coaching. As a result, this teacher-centered professional development encouraged Sara, Grace, and Lisa to enhance their own learning as they engaged in their formalized positions. As Knowles’ et al. (2005) signifies, learners must be willing to learn more and create authentic opportunities to promote learning.

**Principle 5: Orientation to Learning**

The fifth principle of adult learning describes the importance of applying new learning to solve problems (Knowles’ et al., 2005). This principle focuses on how to support adult learning through presenting new knowledge in a way that can be applied or connected to real life situations (Knowles’ et al., 2015). The Weston School District administrators and teachers
recognized a need to focus on improving the early literacy instruction and intervention at Riverside Primary. The administrators used the STLE-3 funding to invest in ISA book study as a plan to target the early literacy needs of students in their district. As the teacher leaders participated in the ISA summer workshop they envisioned how the ISA could support the learning needs of students at Riverside. The teacher leaders applied their new learning of the ISA to strengthen the early literacy instruction of the Riverside classroom teachers.

The teacher leaders also applied their new learning from the district’s teacher leadership professional development to target the improvement of early literacy instruction. For example, Sara used her new knowledge of creating flipped videos to create videos of her implementing the ISA practices during her reading groups. She showed her videos at the ISA book study, so classroom teachers at Riverside could connect their new learning to real life practices of teaching their own students.

Throughout the research period, the teacher leaders also applied their new learning from the ISA workshop, teacher leadership professional development, and planning meetings with district administrators to their professional development sessions. The teacher leaders’ new learning supported them to lead the learning of others, consistent with Teacher Leadership Competencies Framework (2014). For example, the ISA developers provided the teacher leaders with a participants’ resource booklet at the ISA workshop. The teacher leaders continuously referred to the notes they recorded in this booklet along with notes in the EIRD to help facilitate the ISA book study at Riverside. When the teacher leaders facilitated sessions, they showed the teachers how their experiences as learners supported their development as teacher leaders and the facilitation process. To facilitate, they drew on their previous experiences as informal leaders and classroom teachers. As a result, the teacher leaders developed unique approaches of facilitating
teacher learning to address the needs of the school community. The application of Knowles’ et al. (2005) fifth principle further supports the ILA (2015) recommendations to prepare specialized literacy professionals for leading the change process within schools to improve outcomes for all learners.

**Principle 6: Motivation to Learn**

The sixth principle of Knowles et al. (2005) adult learning focuses on the motivation of adults to learn something new and/or improve instructional practices. The sixth principle of adult learning examines why adults are driven to learn something new. Sara, Grace, and Lisa recognized how the design of their leadership positions and learning opportunities targeted the district’s goal of improving early literacy instruction. The teacher leaders’ motivation to learn was driven by their need to improve the literacy learning and experiences of the students at Riverside.

Sara, Grace, and Lisa demonstrated their motivation to support students’ early literacy needs through their application of learning opportunities. The teacher leaders encouraged classroom teachers to use the same terminology connected to the ISA to create consistency and congruency across classrooms. The instructional videos designed by the teacher leaders provided a way to model how the ISA could be implemented into practice with students from Riverside. As a result, the teacher leaders’ motivation to improve early literacy instruction influenced many classroom teachers’ engagement in the ISA practices. For example, classroom teachers described how they independently changed their classroom spaces and instructional language to reflect teacher leaders’ modeling and instructional videos.

The classroom teachers and teacher leaders described how their motivation to engage in the ISA book study was even further emphasized by the participation of district administrators at
the ISA summer workshop and their attendance at the ISA book study. These finding align with Matsumura et al.’s (2009) suggestion that teachers are more receptive to changing their practices when district leaders openly demonstrate value of practices and endorse the positions specialized literacy. Additionally, the findings also link to the Kentucky Teacher Leadership Framework (2015) dimensions of leadership, which include leading by modeling and/or coaching.

**Summary of Adult Learning**

The application of Knowles’ et al. (2005) adult learning principles provide new insight to the preparation and qualifications associated with specialized literacy professional in teacher leadership positions. The alignment of these six principles links directly to multiple teacher leadership frameworks, providing clear examples of practicing specialized literacy professionals implementing suggested roles and responsibilities of teacher leaders. This application also further supports the research on the experiences of specialized literacy professionals and teacher leadership positions (Bean et al. 2015, Calo, Sturtevant & Kopfman, 2015; York & Barr, 2004).

The application of Knowles’ et al. (2005) first principle, learners need to know, suggests teacher leaders need to have an understanding of their roles and responsibilities prior to starting their positions. Sara, Grace, and Lisa attended the ISA workshop before facilitating the ISA book study and attended the teacher leadership professional development throughout the school year. Providing professional development before the school year begins and also engaging in on-going professional learning opportunities continues to inform specialized literacy professionals of their positions as both learners and leaders.

Educational research addresses a need for specialized literacy professionals to be prepared to work with teachers (Bean et al., 2015; IRA, 2010; ILA, 2015). The application of Knowles’ et al. (2005) principles exemplify this need suggesting the ways to prepare to
specialized literacy professionals in leadership positions to work with adult learners. Sara, Grace, and Lisa described prior experience as a characteristic to support their positions as teacher leaders. Specifically, their experience as classroom teachers helped them to build relationships with the classroom teachers to implement ISA practices into their instruction. District administrators selected Sara, Grace, and Lisa and provided on-going professional development as an approach to prepare them as leaders. The application of Knowles’ et al (2005) fourth principle suggests adults need to be engage as learners within a leadership framework.

Knowles’ et al. (2005) framework of adult learning provides one way of examining the complex nature of specialized literacy professionals and teacher leaders. Sara, Grace, and Lisa planned, collaborated, and communicated with their district administrators and the classroom teachers in the school community. The ILA (2015) position statement recommends the roles of specialized literacy professionals move along a continuum from working in a teaching role with students to spending time facilitating teacher learning. The findings from this study could inform Knowles’ et al. (2005) principles of adult learning by capturing a continuum of how teacher leaders negotiate their experiences of learning from adults and then lead adults in learning spaces. In doing so, researchers suggest that educators in leadership positions need further preparation and knowledge of adult learning theories to support their work with adults (Bean et al., 2015; Galloway & Lesaux, 2014; Knowles et al., 2005; Walpole & McKenna, 2013).

The following section further explores the need for future research related to specialized literacy professionals in teacher leadership positions based on the limitations of this study and directions for future research.
Potential Limitations and Directions for Future Research

As with any study, potential limiting factors should be considered. It is important to keep in mind that this study is an exploration of one school district and of three specialized literacy professionals within this community identified by administrators as teacher leaders. Since the findings from this study investigate a specific grant initiative and a specific form of professional development, these influential factors are an integral component of the research findings.

The teacher leaders, district administrators, and classroom teachers provided three different perspectives on how specialized literacy professionals engage with their school community as facilitators. While an in-depth case study provides one set of information, a larger sampling of participants would further inform the literature on specialized literacy professionals and teacher leaders. Specifically, a larger sampling of school districts implementing teacher leadership initiatives such as the STLE-3 and/or the ISA book study would also extend current understandings of literacy teacher leadership.

The focus of this study examined teacher leaders’ engagement in Phase II of the ISA book study. This phase focused on the teacher leaders’ facilitation of the ISA book study, not the direct implementation of classroom teachers’ learning of the ISA into their instructional practices. This study would need to be longer term to address the issue of transfer of learning from the ISA book study professional development into teachers’ classroom practices. An extensive amount of time and data on student assessments is needed to capture the sustainability of teacher leadership positions and the impact of grants on school communities. This study took place during one school year (2014-2015) and captured the initial implementation year of the grant initiative. Limitations include not examining the implementation of the instructional practices suggested in the ISA professional development program, collecting data of student
achievement in the years prior to, during, and following the grant. However, the observations and interviews conducted throughout this school year narrowed the research lens to reveal specific approaches this school district actively engaged in to support and prepare specialized literacy professionals as teacher leaders.

As discussed in the literature review, there is limited research on how district administrators and professional development providers are preparing specialized literacy professionals as teacher leaders and professional development facilitators. Future research needs explore the range of professional development opportunities to prepare teachers and specialized literacy professionals for leadership roles and responsibilities. In addition, research on the preparation of teacher leaders needs to influence the development and implementation of future grant initiatives focused on teacher leadership.

The teacher leaders interviewed and observed as part of this study represented the voices of teachers in the primary building. Instead of being limited to the experiences of one school building, future studies could focus on the experiences of all teacher leaders and classroom teachers within an entire district. This would provide a wider range of experiences to better describe and refine the structures and resources needed to support teacher leaders.

Conclusion

There is a need for research that captures how specialized literacy professionals are engaging in leadership roles. While Bean et al. (2015) and Calo, Sturtevant, and Kopfman, (2015) explored roles and responsibilities through national surveys, my case study focused on the complexities of preparing specialized literacy professionals for formalized leadership positions. This study provides insights into understanding how one district’s vision, on-going learning experiences, and emphasis on expertise led to enacting a grant designed to improve literacy
instruction for primary learners. Additionally, the individual experiences of practicing specialized literacy professionals in leadership roles could inform teacher leadership frameworks by providing examples of the multiple roles teacher leaders from one school community engaged in as leaders. The results of the study reflect previous recommendations (Bean et al., 2015; ILA, 2015; Swift & Kelly, 2010) for specialized literacy professionals to have knowledge of adult learning and to implement on-going professional learning experiences that support adult learning. Finally, this study exemplifies the notion that specialized literacy professionals and teacher leader roles are complex and continuously evolving. There remains a need to further investigate the development and evolution of teacher leaders’ roles and responsibilities, experiences negotiating with multiple stakeholders, and the influence of professional learning experiences.
REFERENCES


Calo, K.M., Sturtevant, E.G., & Kopfman, K.M. (2015). Literacy coaches’ perspectives of themselves as literacy leaders: Results from a national study of K-12 literacy coaching and leadership. Literacy Research and Instruction, 54(1), 1–18.


APPENDIX A

Excerpt of STLE-3 Grant

Teacher Leaders (0.6 FTE teacher/0.4 FTE instructional coach, $1,000 stipend): This will not be a new position to the district, but rather an enhancement of the existing Teacher on Special Assignment positions (TOSA) that were implemented under round one of the Strengthening Teacher and Leader Effectiveness funding. These positions will continue in the district through additional funding; however, they will play an important part of the career ladder and TLE Continuum. In this enhanced position, the teachers will be required to complete the Methods Theory Survey Course, which will ensure that these educators are using the same research-based strategies as other teachers on the career ladder. As instructional coaches, these teachers will be embedded into classrooms across the district to co-teach and model lessons for their colleagues using research-based teaching practices, and like the other positions on the teacher career ladder the objective will be to increase the achievement of all students on state exams. As part of the TLE Continuum, these educators will also work on curriculum development and implementation of the Common Core Learning Standards, contribute six flipped classroom video lessons annually, serve as mentors to newer teachers not yet on the career ladder, or other faculty members who may be struggling to become highly effective/efficient. These educators will lead professional development through Methods Theory and other building/district initiatives, and be required to participate in 25 hours of professional development annually to increase their own skills. These teachers must also be willing to accept a transfer within the district to a determined area of need.

Transition Leader (0.6 FTE teacher/0.4 FTE assistant principal, $1,000 stipend): A new position to the district, these educators will bridge the gap between the teacher and principal career ladders. This position will be available to those teachers who have aspirations of becoming a principal but don’t yet have school building leader experience. In this role, they will
APPENDIX B

Screenshot of the Interactive Strategies Approach (ISA) Website

APPENDIX C
Sample Page from the ISA Facilitators’ Guide

Chapter 5: Phonological Awareness
Total Length of Recordings: about 1 hr. 35 min
Discussion Time Estimate: 2 hrs. 25 min to 3 hrs. 30 min (including all activities)

Topic A: What is Phonological Awareness and Why is it Important?
Length of Recording: about 25 min
Discussion Time Estimate: 30 min to 35 min (including initial discussion)

“Next, let’s read through and discuss the topic objectives listed on p. 43 of the Resource Book.”

Topic Objectives
After completion of this topic, you should be able to:
- Identify the most important phonological analysis skills for literacy learners
- Recognize the multiple “levels” of phonological analysis
- Explain the difference between phonics and phonological awareness and between phonological awareness and phonemic awareness
- Explain the relationship between phonological awareness and literacy development

2-3 min

Begin the recording for Topic A: What is Phonological Awareness and Why is it important?
Pause the recording to allow discussion when prompted or where it appears to be relevant for your group.

APPENDIX D

Sample Page from the ISA Participants’ Resource Booklet

Chapter 5: Phonological Awareness

Goals for the Child: The child will develop the belief that that reading and writing are enjoyable and informative activities which are not beyond his/her capabilities. Further, the child will be able to say the individual sounds in words spoken by the teacher and blend separate sounds to form whole words.

Before we begin our discussion of Chapter 5, please take a couple of minutes to respond to the following questions.

How has your thinking or understanding about phonological awareness changed through your reading of the chapter?

• What new knowledge regarding phonological analysis skills have you developed?

• What new insights do you have into ways to help children become phonologically/phonemically aware?

• Did you encounter things that run counter to your previous thinking about the development of phonological/phonemic awareness?

Topic A: What is Phonological Awareness and Why is it Important?

Topic Objectives
After completion of this topic, you should be able to:

✓ Identify the most important phonological analysis skills for literacy learners.
✓ Recognize the multiple “levels” of phonological analysis
✓ Explain the distinctions between phonics and phonological awareness and between phonological awareness and phonemic awareness.
✓ Explain the relationship between phonological awareness and literacy development.

### Timeline of Data Collection: October 2014-September 2015

#### October 2014
- IRB Process and Approval
- District Approval
- Recruit Participants/Obtain Consent Forms
- Informal communication with TLs and administrators
- Initial observation of ISA book study PD
- Collect documents related to PD and TL

#### November 2014
- Obtain STLE-3 Grant
- Attend planning meetings with literacy coaches preparing for web-enhanced book study PD
- Collect documents related to PD and TL

#### December/January/February/March 2014-15
- Observe ISA book study PD
- Attend teacher leadership PD
- Attend meetings with TLs and principal
- Analyze data: Transcribe
- Collect documents related to PD and TL
- Revise Interview Questions and submit modifications to IRB

#### April 2015
- **Interviews:**
  - Individual interviews with TLs
  - Focus Group One: Initial focus group of TLs and building principal
  - Teacher Questionnaire distributed
- **Analyze data:**
  - Transcribe, code, and analyze data
  - Collect documents related to PD and TL
  - Continue to observe PD sessions and planning sessions.

#### May 2015
- **Interviews:** Individual interviews district administrators
- **Analyze Data:**
  - Transcribe, code, and analyze data
  - Continue to observe PD sessions and planning sessions
  - Write chapters based on initial data collection and update literature review.

#### June 2015
- **Interviews:** Focus group interviews with classroom teachers
- **Analyze Data:**
  - Transcribe, code, and analyze data
  - Continue to observe PD sessions and planning sessions
  - Write chapters based on initial data collection

#### July-September 2015
- Analyze all data and write chapters based on findings from data analysis
## APPENDIX F

### Observational Event: Facilitating Professional Development

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Hours</th>
<th>Location/Event</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10/31/14</td>
<td>1:00-3:00</td>
<td>Riverside Primary ISA Book Study</td>
<td>Grace, Sara, Lisa&lt;br&gt;Two district administrators&lt;br&gt;K-2 Staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2 hours)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>12/4/14</td>
<td>12:30-3:00</td>
<td>Riverside Primary ISA Book Study</td>
<td>Sara, Lisa&lt;br&gt;Two district administrators&lt;br&gt;K-2 Staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2.5 hours)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>3/9/15</td>
<td>3:00-4:00</td>
<td>Riverside Primary ISA Book Study</td>
<td>Grace, Sara, Lisa&lt;br&gt;One district administrator&lt;br&gt;K-2 Staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>3/27/15</td>
<td>8:00-11:00</td>
<td>Riverside Primary ISA Book Study</td>
<td>Grace, Sara, Lisa&lt;br&gt;Two district administrators&lt;br&gt;K-2 Staff&lt;br&gt;Literacy Coach from another district</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3 hours)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5/11/15</td>
<td>3:00-4:00</td>
<td>Riverside Primary ISA Book Study</td>
<td>Grace, Sara, Lisa&lt;br&gt;Two district administrators&lt;br&gt;K-2 Staff&lt;br&gt;Three literacy staff and special&lt;br&gt;education teacher from another district</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>5/21/15</td>
<td>12:00-3:00</td>
<td>Intermediate School Integration of ISA into special education instruction</td>
<td>Sara and Grace&lt;br&gt;(3-5) Special Education Teachers and&lt;br&gt;their Teaching Assistants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3 hours)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>6/11/15</td>
<td>12:00-3:00</td>
<td>Intermediate School Integration of ISA into special education instruction</td>
<td>Sara and Grace&lt;br&gt;(3-5) Special Education Teachers and&lt;br&gt;their Teaching Assistants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3 hours)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total number of observations and hours teacher leaders facilitating professional development from October 2014-May 2015:  
**7 observations (15.5 hours)**
## Observational Event: Planning Professional Development

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Hours</th>
<th>Location/Focus</th>
<th>Attendance</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11/12/14</td>
<td>12:30-2:30</td>
<td>Riverside Primary/ ISA Book Study</td>
<td>Sara, Grace, and Lisa</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide</td>
</tr>
<tr>
<td>2</td>
<td>11/19/14</td>
<td>1:00-3:00</td>
<td>Intermediate School/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide</td>
</tr>
<tr>
<td>3</td>
<td>1/21/15</td>
<td>11:15-11:15</td>
<td>Riverside Primary/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide</td>
</tr>
<tr>
<td>4</td>
<td>1/28/15</td>
<td>1:00-3:00</td>
<td>Intermediate School/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
<tr>
<td>5</td>
<td>3/18/15</td>
<td>12:30-3:00</td>
<td>Riverside Primary/ ISA Book Study</td>
<td>Sara, Grace, and Lisa</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
<tr>
<td>6</td>
<td>4/29/15</td>
<td>1:00-3:00</td>
<td>Riverside Primary/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
<tr>
<td>7</td>
<td>5/1/15</td>
<td>12:00-3:00</td>
<td>Intermediate School/ Integration of ISA</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
<tr>
<td>8</td>
<td>5/4/15</td>
<td>12:00-3:00</td>
<td>Riverside Primary/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
<tr>
<td>9</td>
<td>5/7/15</td>
<td>10:30-12:30</td>
<td>Intermediate School/ ISA Book Study</td>
<td>Sara and Grace</td>
<td>EIRD Book, ISA website, Participants Booklet, Facilitators Guide, Google Slides, Google Drive</td>
</tr>
</tbody>
</table>

Total number of observations and hours teacher leaders planning for professional development at Riverside Primary from October 2014-May 2015:

9 observations (21.5 hours)
## APPENDIX H

**Observational Event: Meeting with District Administrators**

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Hours</th>
<th>Location</th>
<th>Attendance</th>
<th>Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11/24/14</td>
<td>1:30-2:30</td>
<td>Riverside Primary</td>
<td>Sara and Grace</td>
<td>ISA Book Study at Riverside Primary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td>One administrator</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>12/22/14</td>
<td>1:00-2:30</td>
<td>Riverside Primary</td>
<td>Sara, Grace, and</td>
<td>ISA Book Study at Riverside Primary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1.5 hours)</td>
<td></td>
<td>Lisa Two administrators</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1/20/15</td>
<td>10:30-12:00</td>
<td>Riverside Primary</td>
<td>District RtI Planning Meeting</td>
<td>Sara, Grace, and Lisa 3 Administrators</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1.5 hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>2/4/15</td>
<td>12:00-3:00</td>
<td>Riverside Primary</td>
<td>Sara and Grace</td>
<td>ISA Book Study at Riverside Primary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2 hours)</td>
<td></td>
<td>One administrator</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>3/11/15</td>
<td>12:00-1:00</td>
<td>Intermediate School</td>
<td>Sara and Grace</td>
<td>Integration of ISA into special education instruction at intermediate school</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td>Two administrators</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>3/23/15</td>
<td>12:30-1:30</td>
<td>Riverside Primary</td>
<td>Sara and Grace</td>
<td>ISA Book Study at Riverside Primary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td>One administrator</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>4/14/15</td>
<td>1:00-3:00</td>
<td>Riverside Primary</td>
<td>Sara and Grace</td>
<td>Planning for School Board Meeting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3 hours)</td>
<td></td>
<td>One administrator</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>5/11/15</td>
<td>12:00-1:00</td>
<td>Riverside Primary</td>
<td>Sara and Grace</td>
<td>ISA Book Study at Riverside Primary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1 hour)</td>
<td></td>
<td>One administrator</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>5/19/15</td>
<td>11:30-1:30</td>
<td>Intermediate School</td>
<td>Sara and Grace</td>
<td>Integration of ISA into special education instruction at intermediate school</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2 hours)</td>
<td></td>
<td>Two administrators</td>
<td></td>
</tr>
</tbody>
</table>

Total number of observations and hours teacher leaders met to plan with district administrators from October 2014-May 2015:

**9 observations (14 hours)**
APPENDIX I

Observational Event: Participating in Professional Development

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Hours</th>
<th>Location</th>
<th>Attendance</th>
</tr>
</thead>
</table>
| 1  | 12/4/14 | 8:00-11:30 (3.5 hours) | High school | Three district administrators Sara, Grace, and Lisa  
All teacher leaders in the district |
| 2  | 1/14/15 | 8:00-11:00 (3 hours)  | High school | Three district administrators Sara, Grace, and Lisa  
All teacher leaders in the district |
| 3  | 3/17/15 | 8:00-3:00 (7 hours)  | High school | Three district administrators Sara, Grace, and Lisa  
All teacher leaders in the district  
Outside expert PD leader |
| 4  | 5/14/15 | 12:30-3:30 (3 hours)  | High school | Three district administrators Sara, Grace, and Lisa  
All teacher leaders in the district  
Outside expert PD leader |

Total number of observations and hours teacher leaders participating in professional development for teacher leaders in Weston School District from October 2014-May 2015:

4 observations (16.5 hours)
APPENDIX J

Observational Event: Engaging in Special District Events

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Hours</th>
<th>Location</th>
<th>Event</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2/3/15</td>
<td>3:00-4:00 (1 hour)</td>
<td>High School</td>
<td>Mentor Meeting</td>
<td>Sara and Grace Untenured teachers in the district</td>
</tr>
<tr>
<td>2</td>
<td>2/23/15</td>
<td>7:00-8:00 (1 hour)</td>
<td>High School</td>
<td>BOE Meeting Kindergarten Presentation</td>
<td>Sara 3 Administrators School BOE and public</td>
</tr>
<tr>
<td>3</td>
<td>3/16/15</td>
<td>3:00-4:00 (1 hour)</td>
<td>Intermediate Building</td>
<td>Curriculum Mapping</td>
<td>Grace One administrator Teachers at the intermediate building</td>
</tr>
<tr>
<td>4</td>
<td>4/2/15</td>
<td>6:00-8:00 (2 hours)</td>
<td>Middle School Building</td>
<td>Family Fun Fair</td>
<td>Sara and Grace Family and students in the district 3 Administrators</td>
</tr>
<tr>
<td>5</td>
<td>4/21/15</td>
<td>6:00-8:00 (2 hours)</td>
<td>High School</td>
<td>BOE Meeting on the ISA book study</td>
<td>Sara and Grace 3 Administrators School BOE and public</td>
</tr>
<tr>
<td>6</td>
<td>6/22/15</td>
<td>1:30-3:00 (1.5 hours)</td>
<td>Riverside Primary</td>
<td>District Reading Department Meeting</td>
<td>All reading teachers in the district One district administrator Sara, Grace, and Lisa</td>
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</tbody>
</table>

Total number of observations and hours teacher leaders attended events in the Weston School District from October 2014-May 2015:
**6 observations (8.5 hours)**
APPENDIX K

Sample of Grace’s notes in the ISA Participants’ Resource Booklet

## Interview Log

<table>
<thead>
<tr>
<th>Interview Number</th>
<th>Participant Description</th>
<th>Date</th>
<th>Hours</th>
<th>Location</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Administrator (Superintendent)</td>
<td>6/17/15</td>
<td>9:45-11:00</td>
<td>District Office</td>
<td>One interview only</td>
</tr>
<tr>
<td>2</td>
<td>Administrator (Assistant Superintendent)</td>
<td>4/17/14</td>
<td>9:00-10:00</td>
<td>District Office</td>
<td>One interview only</td>
</tr>
<tr>
<td>3</td>
<td>Administrator (Primary building principal)</td>
<td>5/11/15</td>
<td>9:00-10:00</td>
<td>Riverside</td>
<td>Initial Interview</td>
</tr>
<tr>
<td>4</td>
<td>Sara</td>
<td>4/17/15</td>
<td>9:00-10:00</td>
<td>Riverside</td>
<td>Initial Interview-Reading Teacher on Special Assignment/Teacher Leader</td>
</tr>
<tr>
<td>5</td>
<td>Lisa</td>
<td>4/17/15</td>
<td>10:30-11:30</td>
<td>Riverside</td>
<td>Initial Interview-K-2 Literacy Coach/Teacher Leader</td>
</tr>
<tr>
<td>6</td>
<td>Grace</td>
<td>4/17/15</td>
<td>1:30-2:30</td>
<td>Riverside</td>
<td>Initial Interview-3-5 Literacy Coach/Teacher Leader</td>
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<tr>
<td>Focus Group 1</td>
<td>Kindergarten Teachers (2)</td>
<td>6/23/15</td>
<td>1:00-2:00</td>
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<td>Focus Group 2</td>
<td>Kindergarten Teachers (3)</td>
<td>6/23/15</td>
<td>2:00-3:00</td>
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<tr>
<td>Focus Group 3</td>
<td>1st grade teachers (3)</td>
<td>6/25/15</td>
<td>1:00-2:00</td>
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<tr>
<td>Focus Group 4</td>
<td>2nd grade teachers (3)</td>
<td>6/25/15</td>
<td>10:45-11:45</td>
<td>Riverside</td>
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</tr>
</tbody>
</table>

Total Participants: 17  
Focus Group Participants Classroom Teachers: 11  
Teacher Leaders: 3  
Building Administrator: 1  
District Administrators: 2
APPENDIX M

Individual Interview Protocol for District Level Administrators

Thank you for participating in this interview. Some of these questions you may have already answered in our informal conversations, but I want to have the best understanding I can of your experiences.

District Grant

Tell me about the development of the STLE-3 Grant focused on teacher leadership and professional development.

Why was this specific grant chosen for the district?

How is this grant being implemented throughout the primary school?

Describe the district plan for the sustainability of this grant.

Nature of Teacher Leadership

Talk about the selection process for teacher leaders in your district.

How does your district define the roles/responsibilities of:

- Literacy specialist/reading teacher
- Literacy coach
- Literacy leader

When your district uses the term “teacher leader”, what does this mean to you?

Support Systems

Share some of the resources that support teacher leaders in your district.

Share some of the resources and support for teacher leaders in your district.

What are the roles and responsibilities of the teacher leaders in your district?

Current Professional Development

Talk about the rationale for selecting the current professional development project implemented at the primary school?

From your perspective, what makes this different than professional development in prior years? What is similar?
Individual Interview Protocol for District Level Administrators (Appendix M cont.)

Briefly describe how the district vision has shifted this year in relation to literacy practice. What was your role in creating this shift, and how has it transformed positions in the district this year?

Please describe your role in this professional development?

What roles and responsibilities do you associate with a professional development facilitator?

Background and experiences

Briefly describe your administrative experience in the district.

How long have you been in this current position?

Briefly describe your background and experiences related to literacy instruction?

Talk about a professional development experience that was most beneficial to you.
APPENDIX N

Individual Interview Protocol for Building Level Principal

Thank you for participating in this interview. Some of these questions you may have already answered in our informal conversations, but I want to have the best understanding I can of your experiences.

District Grant

Tell me your role in the development of the STLE-3 Grant focused on teacher leadership and professional development.

What prompted this grant and what are your goals for the grant?

Describe the district plan for sustainability of this grant.

Nature of Teacher Leadership

Talk about the process selection process for teacher leaders in your district?

When your district uses the term “teacher leader”, what does this mean to you?

How does your district determine roles and responsibilities of?

- Literacy specialist/reading teacher
- Literacy coach
- Literacy leader

Current Professional Development

Talk about a professional development experience that was most beneficial to you.

Briefly describe how the grant and professional development initiatives in your school building have shifted this year in relation to literacy practice.

What is your role in creating this professional development, and how has it transformed positions in your school building this year? (May already be answered)

Tell me your thoughts on the rationale for selecting the current professional development project being implemented at your primary school?

From your perspective, what makes this different than professional development in prior years? What is similar?
Individual Interview Protocol for Building Level Principal (Appendix N cont.)

Please describe your leadership role in this professional development initiative?

Describe the selection process of facilitators for this web-based professional development for the primary building. (May already be answered)

Support Systems

Share the resources that support teacher leaders in your building.

Share the resources and support for the facilitators of the web-based professional development.

What are the roles and responsibilities of the teacher leaders in your building? (May already be answered)

How do you stay current with literacy instruction and research?

Background and experiences

Briefly describe your administrative experience in the district.

How long have you been in this current position?

Briefly describe your background and experiences related to literacy instruction?
APPENDIX O

Individual Interview Protocol for Teacher Leaders

Thank you for participating in this interview. Some of these questions you may have already answered in our informal conversations, but I want to have the best understanding I can of your experiences.

Nature of Teacher Leadership

Tell me about your current position.
What are you hoping with happen with this grant?

Describe the process of being selected as a teacher leader in your district.

When your district uses the term “teacher leader”, what does this mean to you?
Do you think that is the same or different than what it means to the district?

How does your district determine the roles and responsibilities of:

- Literacy specialist/reading teacher
- Literacy coach
- Literacy leader

Talk about how your current position was impacted this year by the STLE-3 Grant.

Current Professional Development

Talk about a professional development experience that was most beneficial to you.

Briefly describe how the grant and professional development initiatives in your school building have shifted this year in relation to literacy practice.

Tell me about your role in this shift.

What are your thoughts on the current professional development project being implemented at your primary school?

From your perspective, what makes this different than professional development in prior years? What is similar?

Please describe the nature of your role in this professional development (may already be answered)

Describe the process of being selected to facilitate this web-based professional development for the primary building (may already be answered)
Support Systems

Share some of the resources and support provided to you in your school community to support your learning.

How are you deciding what support and resources to use and what not to use in your school community? What guides your decision making?

Share some of the resources and support provided to you through your school community in your role as a facilitator.

How are you deciding what support and resources to use and what not to use in professional development?

Background and experiences

Briefly describe your teaching experience in the district.

How do you stay current with literacy instruction and research?

Briefly describe your background and experiences related to literacy instruction?
APPENDIX P

Questionnaire for Classroom Teachers

Background Information:

Thank you for your willingness to participate in this research study about professional development. The goal of this study is to understand and share new approaches for professional development. To inform a wider community about your district’s professional practices, we will conduct focus groups to discuss PD in general and the current PD specifically. These voluntary sessions will involve a small group conversation on the topic(s) teacher leadership, professional development, and teachers as facilitators. This questionnaire will inform placement in focus groups.

1. What is your current position?

☐ Administrator  ☐ Literacy Specialist  ☐ School Psychologist

☐ Kindergarten teacher  ☐ Special Education teacher  ☐ ESL Teacher

☐ 1st grade teacher  ☐ Speech and Language  ☐ School Librarian

☐ 2nd grade teacher  ☐ Teaching Assistant  ☐ Literacy Coach

☐ Other (please specify)____________

2. How many years of work experience do you have in education?

Please round to whole years

a. _____ year(s) working as a teacher at this school

b. _____ year(s) working as a teacher in this district

c. _____ year(s) working as a teacher in total

d. _____ year(s) working in an education administrative role
Questionnaire for Classroom Teachers (Appendix P cont.)

3. Have you ever participated in a professional development book study?
   - Yes  - No

4. Have you ever facilitated professional development in your district?
   - Yes  - No

5. Would you be willing to participate in a focus group?
   - Yes  - No

   The focus group will be approximately 40 minutes, located in your school building, and will be scheduled based upon availability of those participating. The group will meet once in June 2015. The data collected in these interviews will be confidential, with audio recordings de-identified.

   If yes, please provide your name and e-mail, so that I may contact you to schedule the focus group discussion.

   Name: ________________________________________________________________

   E-mail: ________________________________________________
APPENDIX Q

Focus Groups Protocol: Classroom Teachers

Each group will have 3-4 participants drawn from K, 1, and 2 teachers who consented to be interviewed.

Welcome

Thank you for volunteering to participate in this small group discussion. My name is Thea Yurkewecz. I am a doctoral student in the Department of Literacy Teaching and Learning at the University at Albany, State University of New York. Today, we will talk about your experiences with professional development and teacher leadership in your school community to help extend research in this area.

Discussion Format

Before we begin, here is a brief overview of the discussion format:

• For each question, each of you should take part in the discussion.
• As a discussion, please respond to what others are saying, whether you agree or disagree. There are no right or wrong answers. Don’t worry about having a different opinion than your peers. I am here to learn from you. Please do not feel required to respond to a particular question if you don’t want to answer. Please respect the privacy of everyone in the room and do not share or repeat what is said here.
• I am going to audio-record the discussion today and also take notes so that I do not miss any of your comments.
• I will not include your real names or any other information that could identify you in any written documents. The recordings and notes will be on a password-protected file in a password-protected computer.
• Finally, this discussion is going to take about forty-five minutes and I ask that you stay for the entire meeting.

Does anyone have any questions before we start?

Introductions (5 minutes)

We’ll start by going on my right and have each person introduce him or herself. Please tell us your first name and your current teaching position.

Group Discussion-Topic 1 (20 minutes)

Topic 1: Professional Development
Focus Groups Protocol: Classroom Teachers (Appendix Q cont.)

The first discussion is to share your experiences with professional development related to literacy.

1. This school year, you engaged in literacy professional development on the Interactive Strategies Approach (ISA), curriculum mapping, technology support and various methods courses. Did you participate in any other professional development this year?

2. What materials and resources from these professional development opportunities have impacted your teaching, if at all?

3. Please give a specific example of how the ISA professional development impacted your teaching, if at all?

4. How do you anticipate continued use of what you learned from the professional development this year? If not, why?

5. In what areas do you think you need more professional development?

6. How has the professional development helped created or increased a sense of community among the educators? If not, why?

Group Discussion-Topic 2 (15 minutes)

Topic 2: Teacher Leaders and Literacy Coaches

1. Tell me about the roles and responsibilities of teacher leaders in your building this year?

2. Is this similar to or different than how you initially envisioned their role? In what ways?

3. How did these teacher leaders impact your teaching, if any?

If needed:
4. Tell me about the roles and responsibilities of literacy coaches in your building this year?

5. Is this similar to or different than how you initially envisioned their role? In what ways?

6. How did these literacy coaches impact your teaching, if any?

Final Thoughts (10 minutes)

Thank you all for coming in today and sharing your experiences. Do you have any final thoughts about these topics or additional information that you want to share?