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# Introduction

Every day, moment by moment and decision by decision, thousands of teacher leaders nationwide are working to improve the quality of education. As they fill an ever-expanding array of roles—mentors, coaches, curriculum reformers, advocates, and staff developers—in their schools and districts, their leadership development journeys are most often a process of trial and error. Teacher leadership is defined in many ways (see Chapter 1). It does not come with a user’s manual, and few teacher leaders receive specialized training and support for their new roles. Instead, they must learn how to guide changes in learning environments while negotiating a complex obstacle course of district politics, interpersonal conflicts, and reform initiatives. Although the journey of each teacher leader is different, all must find strategies to cope with unfamiliar situations with few tools and resources. In the following montage, excerpts from 3 of the 16 cases that appear in this book demonstrate that even highly skilled, perceptive educators find their new roles inevitably lead them back to school—fumbling for answers and questioning themselves.

Mrs. G., I need your help *now*. I tried the science lesson and the kids just destroyed it!” I try to listen to Ryan as he explains to me everything the students have done wrong. He is having this conversation in front of his students in the middle of class. *What has gone wrong? Has all of my work been a waste of time?* (When Do I Tell? Chapter 3)

Mark interrupts, “Again, I am not comfortable with this idea of accountability and visits.” This spark ignites other voices. . . . “I don’t feel we have enough time to plan this right now.” “What if we only offer positive feedback first?” “What about first-year teachers? Can we be excused?” *I don’t know how to respond to this snarled web of worries and fears.* (Filling a Leadership Vacuum, Chapter 4)

One of the few colleagues who knew about my decision to apply quickly grabbed me. “Steve told the whole staff you applied to the

district office. . . . He also joked we should shun you like the Amish do when a member of the community chooses to leave.” *I didn’t even know if I had the job yet, but I already felt like I violated the trust of the community.* (Where Do I Stand? Leadership in a Culture of Us and Them, Chapter 4)

Consensus is growing that successful school improvement will require strategies that foster leadership at all levels of the system (Elmore, 2000; Fullan, Hill, & Crevola, 2006; Lambert, 2003; Spillane, 2006). As teacher leaders, like the ones spotlighted in the previous montage, are called on to lead school improvement efforts, there is increasing recognition that they need meaningful learning opportunities to develop leadership skills. All of the teacher leaders who contributed their stories to this volume used a powerful form of professional development—case methods—to reflect on and learn from key turning points in their journeys into leadership. Learning from case methods is powerful because of the inherent qualities cases offer:

- *Compelling narrative accounts:* The cases explore real, and really troubling, events. These stories of leadership in the making—and often leadership under fire—actively engage readers in the authors’ experiences and provide insight into the many faces and phases of teacher leadership. By writing these accounts, the authors themselves gained a deeper understanding of teacher leadership and the problematic events that led them to write their cases.

- *Readily identifiable conflicts and contexts:* The cases present a broad range of leadership dilemmas that arise frequently across diverse roles and settings. From special educators to librarians to district literacy coaches to beginning teacher mentors, all of the case authors explore the rough and often murky terrain of teacher leadership. Among the 16 cases, at least 1 has special meaning for every teacher leader and educator.

- *Unsolved problems and unanswered questions:* The cases do not end tidily. The authors do not wrap up the conflict in the last several paragraphs and present a solution. Instead, all 16 cases end in the midst of a quandary, challenging readers to think about what they would do in the same circumstances. In doing so, they provoke deep thinking and discussions about the factors that contributed to the dilemma and how to solve it from multiple points of view.

## WHO THIS BOOK IS FOR

We imagine that this book may be of use to many educators—including school and district leaders—who are interested in learning more about

teacher leadership, looking for ways to support teacher leaders, or seeking effective professional development models. However, we wrote this book with two specific groups of educators in mind: (1) staff development professionals and (2) teacher leaders.

## **Staff Development Professionals**

With this book, we want to encourage all of those charged with designing and facilitating professional development for teacher leaders—curriculum directors, instructional leaders, staff development consultants, and education professors—to explore the powerful ways in which case writing and collaborative case analysis foster teacher leadership. We hope that you will be motivated to undertake leading case-writing seminars in your settings and inspire teacher leaders to write their leadership cases. Be forewarned: Case writing requires a significant investment. However, the rewards are great. According to the writers whose cases are published here, there are many reasons to take on this challenging work. As Naumes and Naumes (1999) note, writing a case is essentially an action research project with a sample of one. It's a rare opportunity for teacher leaders to engage in introspection, to examine a troubling or painful experience they want to understand, with the support of empathetic colleagues.

We focus on using case methods with teacher leaders because there is a critical need to provide teachers who move into leadership roles with opportunities to develop their leadership skills. However, case analysis can be a productive experience for any group that has a stake in fostering teacher leadership. For example, analyzing cases can be a very effective form of professional development for administrators by helping school and district administrators understand the challenges that teacher leaders face and stimulating conversations about what they can do to support the work of teacher leaders. Engaging mixed audiences of administrators and teacher leaders in case analysis can create a shared understanding of the benefits that can result from working together, as well as help both groups appreciate the challenges and pressures that are pervasive in each other's work.

## **Teacher Leaders**

If you are a teacher leader, you will find that the cases in this book are thought provoking. Some of the cases will be familiar and resonate with your experiences; other cases will give you a glimpse into teacher leadership journeys that are quite different from yours. As you see from our comments to staff development professionals, and as you follow our approach through this book, working with a group is *the* best way to engage in the process. The power of case methods is the learning that

comes from collaboratively engaging in discussions, asking probing questions, challenging assumptions, and considering alternate points of view. For that reason, we urge you to not just read and analyze the cases in this book on your own. You will benefit more from case analysis if you have a group—or at least one colleague—to talk to about your questions and ideas. If you lack a facilitator, try to organize your own grassroots teacher leader case-analysis/writing retreat. Throughout Chapter 2, we have provided tips and suggestions to help you do so. Or perhaps you can find an online study partner who will be willing to work through the cases (virtually) with you.

If you must work through these cases by yourself, try journaling your questions and reactions—in addition to answering the discussion questions—to examine how these cases relate to your experiences as a teacher leader. Exploring the challenges encountered in these cases will stimulate you to reflect on your leadership dilemmas. Capturing those reflections in a writer's notebook is a great way to nourish your writing and leadership work, and it will encourage you to pay close attention to all aspects of your practice. Collect your thoughts, feelings, and uncertainties about your leadership trials, triumphs, and tribulations as you experience them. Later on, you may find a seed for sprouting a powerful case of your own.

## **OVERVIEW: HOW TO USE CASE ANALYSIS AND WRITING**

The starting place to engage in case methods is case analysis—that's where all of the teacher leaders whose stories appear in this book began. To make meaning of their experiences, they read, discussed, and debated the cases of others. The rich group discussions that form the core of the case analysis process allow all of those who participate in the process to learn from the experiences of others who have pioneered leadership roles. These conversations stimulate participants to analyze the similarities and differences they find in their own leadership dilemmas. The discussions also reveal the skills that teachers need to become effective leaders. This might mean deepening their content knowledge, helping them develop facilitation skills, supporting them in gaining mastery of conflict resolution techniques or building relationships, refining their coaching or mentoring strategies, or assisting them in comprehending and navigating political forces that surround their work.

The next step is to learn to facilitate case discussions. We contend that learning to facilitate adult learning is an essential leadership skill, so we want to encourage all education leaders, regardless of role, to learn to facilitate group case analysis. The facilitator's job is to make the work

easier by creating a structure to help groups work together constructively. By breaking the learning down into a series of manageable steps, the facilitator improves the group's ability to analyze problems and extends what the group can accomplish far beyond what an individual can do alone. The facilitator also helps the group reflect on and articulate their observations and the implications of their learning for their professional practice. Whether or not you assume a formal facilitator role, learning to use facilitation skills will help you to be a more effective problem solver and contributor to group work. The best way to learn to facilitate is to give it a try (see Chapters 2 and 6 for suggestions on how to get started).

Finally, the case-writing process sharpens teacher leaders' abilities to probe their leadership dilemmas, to identify the real issues, to analyze the dynamics of events, and to examine the consequences of their actions. Engaging in group writing helps teacher leaders gain insight into their leadership practices, as well as the leadership practices and challenges of peers, and it forces teacher leaders to examine the perspectives of other stakeholders involved in a reform effort. The product—their finished cases—contributes to the profession by giving others the chance to learn from their experiences. Further, completing a well-crafted case affirms the teacher leaders' abilities to communicate the expertise they have to offer.

## **ORGANIZATION OF THE BOOK**

The book is organized to accomplish three objectives. First, it introduces research that documents the need to develop quality professional learning opportunities for teacher leaders and the potential for using case methods to fulfill that need. Next, it guides you through the processes of case analysis and case writing. Finally, the facilitation guides and the discussion questions that accompany each of the 16 teacher leadership cases offer ideas to help you get the most out of your work with the cases. Although we present a strong rationale for using case methods to provide teachers with the training and support they need to succeed, the reflections of the 16 case authors throughout this book provide the most persuasive argument for engaging in case writing; it provides a rich, substantive professional learning experience for teacher leaders.

Chapter 1 explains why there is a need for a resource like this on teacher leadership. It provides background information about case analysis and case writing and discusses how you can use case methods to create a profound professional development experience. It also documents the supports teachers need to grow as leaders. We conclude the chapter by presenting the evidence we've gathered that demonstrates that case methods are a powerful way to build understanding of the vital role that

teacher leaders play at all levels of the education system, the many demands they face, and the support they need to fulfill their promise.

In Chapter 2, we look at the “hows” of case methods and offer hands-on protocols to guide you in using case writing and case analysis. As we walk through a case-writing seminar, we describe steps for learning about the genre, introduce how to facilitate case analysis, and suggest strategies to help you organize a collaborative writing process to produce compelling cases about teacher leadership.

The 16 cases in this book represent a broad range of leadership dilemmas that arise in diverse settings. They are factual accounts of actual events. The characters and events in these cases are real, but the names, genders, and titles may have been changed to protect their identity. The cases are organized in three sections according to the context of teachers’ leadership work.

Chapter 3 presents the first set of cases. The cases in this chapter recount experiences of teacher leaders who are still in the classroom and have taken on additional leadership roles. Dilemmas arise as they simultaneously straddle the roles of teacher and leader.

The cases in Chapter 4 describe the issues teachers encounter when they leave the classroom to assume leadership roles at the district level. These teacher leaders often play a key role as liaisons between the central office and schools, interpreting policies and practices and attempting to finesse their implementation across a range of schools, each with a unique culture.

Chapter 5 contains a set of cases about the challenges teachers face when they take on leadership roles at the state, regional, or national level. Many of the dilemmas they experience are difficult to anticipate as they pioneer groundbreaking work.

Chapter 6 provides case-by-case facilitation guides to support you as you learn to facilitate case analysis. Each guide describes how to structure your discussions with teacher leaders, administrators, and district leaders and gives you ideas to help you meet the needs of your audience.

Finally, additional materials to support your work appear in the Resources. In Resource A you will find an annotated list of recommended websites, books, and other writings to support your experimentation with case methods. Resource B provides an extensive list of definitions of teacher leadership gleaned from the literature. Resource C presents the Center for Strengthening the Teaching Profession’s (CSTP’s) Teacher Leadership Skills Framework (Resource C1), Teacher Leader Self-Assessment (Resource C2), and a four-part tool titled School and District Capacity to Support Teacher Leadership (Resource C3).

In Resources D and E, we provide sample agendas for case-writing retreats. We encourage you to be creative in your use of all these materials and the cases in this book to lead thoughtful explorations into the challenging work of teacher leadership.