Discerning Professional Identity and Becoming Bold, Socially Responsible Teacher-Leaders

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Abstract: This essay reviews the powerful influence of professional identity in shaping how school leaders perceive their work. I review factors that mold teacher professional identity, implications for educational leadership pedagogy, and supports and barriers for teacher leaders to consider in their quest to more fully enact bold, socially responsible leadership. Looking at leadership as a calling or vocation offers an opportunity to examine the role professional identity in the context of teacher leadership.

The need to prepare teacher leaders is compelling: with each new mandate, teachers do the heavy lifting of classroom-level implementation and with each generational change in communities and school populations, teachers are charged to acculturate the newcomers. Amid a whirlwind of reform efforts, aspiring principals are urged to create democratic organizations and professional learning communities. These demanding educational settings require bold, socially responsible leadership by both principals *and* teachers, continually expanding the roles and responsibilities each must fulfill. I invite those of us who prepare

positional leaders and teacher leaders to consider the powerful influence of *professional identity* in shaping how school leaders perceive their work. I contend that only through a careful discernment process will leaders fully embrace the deep, personal values that underlie each leadership act. Educational administration faculty must judge our work against the same standards to which we hold our students.

Discernment is often associated with vocation. The simple definition, "keenness of insight and judgment" doesn't begin to address the spiritual aspects of discernment, but offers a workable, secular beginning. Leaders in any setting must continually ask themselves what values are driving their actions and whether they are best positioned to act upon those values. Most of us do not question the idea that teaching is a calling, yet we may not characterize positional leadership the same way. The complex reasons people choose to teach are naturally revisited when they choose (or are chosen) to lead. Looking at leadership as a calling or vocation offers an opportunity to examine the role professional identity plays in the context of teacher leadership.

Teacher leadership is not a simple concept and is not clearly defined in the literature. Murphy (2005) has published a thorough review of the literature on teacher leadership and takes ten pages to analyze the many and varied definitions. He stated, "Leadership has historically been defined across two axes, one representing a sense of vision about where an organization should be headed and a second capturing the relational work required to move organizational participants toward that end" (p. 15). In comparing teacher leadership to leadership in general, Murphy remarked that the impetus for school reform is not portrayed as the teachers' own and that teachers influence rather than direct others (p. 16). As the field of teacher leadership matures, teachers may define leadership for themselves. We must, however, support our colleagues now. If educational leadership faculty are truly "active partners" in preparing and influencing leaders, we must embrace the emergent concept of teacher leadership and demonstrate bold, socially responsible leadership by acknowledging this deficiency in our pedagogy.

In this essay, I examine the powerful influence of professional identity in teacher leader development. The first section reviews factors that mold teacher professional identity. The second section outlines implications for educational leadership pedagogy that acknowledges and supports identity development. The final section considers supports and barriers for teacher leaders to consider in their quest to more fully enact bold, socially responsible leadership. The purpose for this work is to refocus the question of teacher leadership by using the *discernment* metaphor so that those of us who study teacher leadership can focus our research questions in new ways.

Why Should Faculty and Aspiring Leaders
Study Professional Identity?

Teachers, whether aspiring principals or teacher leaders, must re-imagine their vocation to fully engage as ethical and moral educators. Contemporary notions of teaching harken back hundreds of years and still reflect images of women and children managed by men. Unlike other professions, teacher professional identity begins in childhood (Collay, 1998). It is fully developed and enacted, however, within the organizational hierarchy of the school. This lifetime of exposure to teachers' work means that teachers arrive at their first positions with strongly-held assumptions about who teachers are and what they do.

After they change sides of the desk, teachers continue to shape their professional identities through interactions with others in the workplace. In addition to long-held beliefs about the teaching profession, teachers have deeply-held beliefs about what leading is and who can do it. Teacher professional identity is rooted in personal beliefs and values that may have begun at home. These values are shaped by individual life experiences that reflect culturally prescribed roles and expectations of women and men, educators of color and White, teachers gay and straight. Like actors, new teachers in their first teaching positions join a cast and walk onto the set of a complex production. Their individually-held beliefs play off of and are tested by the various members of the cast, including students, families, colleagues, and supervisors.

When teachers move into positional leadership roles, the process begins anew. As faculty teaching in educational administration, we must fully understand the powerful dynamics that shape professional socialization for two reasons: one, we ourselves carry beliefs and values that reach back through a lifetime of socialization; we were shaped by assumptions and inequities embedded in historical patterns of schooling. Two, we must engage ourselves and our students in recognizing the power of our own professional socialization so we and our students can fully embrace bold, socially responsible leadership. Faculty and colleagues in schools can then act morally and ethically to obtain equitable outcomes for historically underserved students.

How Can Faculty and Aspiring Leaders
Study Professional Identity?

Research on teacher leadership is intertwined in a generation of research on school reform. I ask leadership faculty to step back from a focus on educational change efforts and outcomes and look more closely at how teachers experience moving into positional leadership, whatever

the organizational context. As educational administration faculty seeking to support the development of moral, ethical school leaders, we and our students must do the following:

- revisit assumptions about how teachers lead;

- analyze patterns of professional socialization that support or hinder leadership; and

- model a transformative pedagogy in our educational leadership programs.

After we reflect on our beliefs about the work of teaching and leading and the roots of those beliefs, we can work more deliberately with colleagues to address supports and hindrances to their leadership in schools.

Revisit Assumptions about How Teachers Lead

Teachers' beliefs about their roles and responsibilities are multifaceted, integrating personal values with professional craft. Teachers' sense of purpose has deeply personal, intellectual, and moral dimensions that must be more fully recognized (Collay, 1999; Little, 2003; Nieto, 2003; Zinn, 1997). Most teachers enter the profession believing that all children can learn and that teachers can be agents of educational change. Some literature about teacher sustainability identifies teacher development of classroom practice as critical to their career satisfaction (Shen, 1997). Still other researchers suggest teachers thrive on a more expanded role that includes collaborating with colleagues and influencing school-wide decisions (Barth, 2001; Elmore, 2002; Holloway, 2003). Lambert and colleagues (Lambert et al., 1996) offered a developmental framework of teacher leadership that focuses on leadership actions and addresses the continuum of teacher leadership.

Teachers who seek or accept positional leadership roles face persistent tensions as they struggle with perceived authority—their own and the principal's. Accepting changes in professional identity is one reason (Brown-Ferrigno, 2003; Zinn, 1997) and role ambiguity is another (Murphy, 2005; Trautman, 2005). Race, class, and gender identity of both principal and teachers add a level of complexity to each interaction. For instance, when the principal is a woman of color and the teachers are primarily White, levels of cultural tension are added to an already challenging organizational dynamic. Teachers' beliefs and values strongly influence their ability to move into more public, formal leadership roles, whether into the principalship or other leader roles. The often frenetic and bureaucratized urban school settings that surround adults and young people limit opportunities for leaders to fully collaborate (Collay, 2004; Peterson, 1994).

For both women of color and White women, formal leadership poses a direct challenge to cultural and social role experiences they have of themselves and others have of them. Teaching is a "feminized" profession, and the historical family metaphor of male principal, lead teacher or older grades teacher and female teacher for younger children is still a mainstay of North American schools (Doyle, 2004; NEA 2006). The ratio of female and male principals is almost equal at the elementary level, at about 54% male and 46% female, although the majority of teachers are women. Secondary principals are still majority male at 77%, with females 23%. Principals of color are about 15% of the total (Wirt, Choy, Rooney, Provasnik, Sen, & Tobin, 2004). Educational leadership presents many images of women in leadership roles, but women are still the primary caregivers. Brown-Ferrigno (2003) reported that family responsibilities were one factor influencing women considering the principalship.

Lambert and colleagues (Lambert et al., 1996) examined the importance of "leader behaviors" necessary on the part of classroom teachers who are not in positional leadership. "Teachers emerge into new and continually expanding roles by the very nature of learning to see themselves differently and therefore behaving differently. (They also do not sabotage those in other leadership roles)" (p. 29). This perspective on teacher leadership allows positional leaders and teacher leaders to rethink their work along a continuum of professional development for themselves and for colleagues. Classroom-based leaders also benefit from assessing their organizational culture from teacher leaders' perspective, analyzing the conditions of professional learning community that already exist and can be strengthened to support and sustain leader development.

Trautman (2005) reminded us that almost 20 years ago, Lieberman, Sax, and Miles (1988) identified teacher leaders' roles and responsibilities, including: Building trust and developing rapport, diagnosing organizational conditions, dealing with processes, managing the work, and building skills and confidence in others. She pointed out that, "many of these skills performed by master classroom teachers are the same required to become campus principals. In fact, many teacher leaders and their administrators feel that the line may be beginning to blur between the responsibilities of teacher leaders and principals" (p. 7). Yet, she found that "barely half of the graduate students felt that they qualified as teacher leaders. This was surprising even after they were all seen as highly qualified master teachers by their own principals and universities" (p. 8). Her recommendations focused on what school leaders must do, including: "provide a safety net that allows teachers to 'try out' the leadership role" (p 8).

When leadership roles are revisited through the lens of task,

different possibilities for positional leaders become evident. At many schools, leaders are classroom-based teachers with specific areas of expertise. Content experts may also be "released" or take specialized assignments to coach colleagues in the building or district. Such assignments provide opportunities to test drive formal leadership roles. These leaders also build bridges between the positional leaders and teachers. Timperley (2005) questioned assumptions in some research about "distributed leadership" and found that coaches played a key boundary-spanning teacher leadership role:

> The 'heroic' leaders in this study were the literacy leaders who engaged in leadership activities that assisted the teachers to question and change their literacy instruction for those students who were not succeeding. They were not the principals. They were the same leaders who the year before had failed to accomplish this task, despite their best efforts. This 'transformation' could not be understood if leadership traits, behaviours, tasks or artifacts had been analysed separately. The change involved a complex interplay among all these aspects, resulting in different leadership activities situated in a particular context. This activity proved to be the useful unit of analysis. (p. 416)

Analyze Patterns of Professional Socialization

Teachers frequently encounter both external and internal resistance to authentic participation in school leadership. External resistance is evident in the historical exclusion of teachers from authentic decision-making about education while at the same time expecting all the problems of mis-education to be solved in the classroom. Authors of the study: *Leadership for student learning: Redefining the teacher as leader* (2001) stated:

> Mischaracterized though they often are as incompetent know-nothings, teachers are, paradoxically, also widely viewed as education's "franchise players," its indispensable but unappreciated leaders in the truest meaning of the word. It is unarguable that they instill, mold, and ultimately control much of the learning and intellectual development of the young people in their charge. It would be difficult to find a more authentic but unacknowledged example of leadership in modern life. (p. 1)

The challenges educational leaders encounter when they attempt to disrupt historical school hierarchies by "sharing, distributing, or diversifying" leadership or creating "collaborative or democratic" learning communities of practice are well-documented (Chrispeels & Yap, 2004; Doyle, 2005; Murphy, 2005; Trautman, 2003, Zinn, 1997). Principals play a critical role as mentors and role models for all teachers. Teacher leaders look to principals as role models, and principals are dependent on teacher

leaders for the success of the enterprise (Marzano, 2003; Smith & Hale, 2002). Teachers may be stymied by ill-defined roles that emerge when they are asked to "lead" from their classroom as mentors or coaches. Additional challenges are faced when, for example, women of color are positional leaders expected to "lead" a primarily White teaching staff, both whom may bring conventional assumptions about leaders and followers. Teacher leadership, therefore, must be understood from multiple cultural perspectives in a variety of situations.

Much of the literature on teacher leadership, shared or distributed leadership, and the role of teacher leadership in professional learning community development is written by and for positional leaders or those who study positional leadership. "Teacher resistance," "reluctant leader," and "buy in" are terms that appear frequently in the reform literature. In spite of constant discussion about and recommendations for collaboration, these terms reflect our internalized acceptance of leadership and followership. The leader (principal) is the visionary and the followers (teachers) are unenlightened and dependent upon that vision. Teachers continue to be characterized as isolated and uninvolved with school reform, and positional leaders are encouraged to find the few that are committed and work with them on teams. Marzano (2003) reviewed characteristics of effective leaders (meaning positional leaders) and why leaders working with teams are necessary for substantive reform. "We are left with the intuitively appealing option of a strong leadership team; the principal and other administrators operating as key players and working with a dedicated group of classroom teachers" (p. 174). This model has potential if teams can expand their influence into the full teaching staff and create a democratic community; if team members cannot engage other colleagues, however, the power of teacher leadership will be limited. The metaphor of "a few good people" is problematic and perpetuates the notion that only some can lead.

The organization of schools and the more common and predictable roles and tasks of teachers and principals are re-enacted in part because they are familiar. We and our students must question the existing roles and ask if there are other ways to reach the goal of more equitable achievement for all students. Timperley (2005), for example, questioned a line of research that assumes greater distribution of leadership is necessarily better: "Rather, I suggest that better understanding is needed of how leadership is enacted when it is distributed and of the conditions under which such distribution is differentially effective if it is to make a difference to instructional practices in schools" (p. 398). Leadership is not a static enterprise, in any case.

Shared, distributed, or diversified leadership should be a means to an

end, not an end itself. One critic of the scant research on teacher leadership calls our attention to the "lack of evaluation in the area of teacher leadership." Murphy (2005) noted:

> . . . in a period of unparalleled concern for social justice, especially around experiences unfolding for youngsters, the failure, or unwillingness, of teacher leadership scholars to weave moral threads into the technical and community dimensions of the teacher leadership chronicle is somewhat unexpected. (p. 162)

Moral threads are tenuous indeed. Schools are organized in ways that make it difficult for anyone to lead from a moral imperative, whether positional leader or teacher leader. Focusing on development of the adult learners within the organization offers some illumination and possibility. Tinkering with organizational structures offers some solace, but without rethinking our beliefs about who can lead and what leading is, little will change. Our emphasis must be advocacy and support for real teachers who work directly with children and families. Only by interrogating their beliefs about ethical, moral leadership will the right path become evident.

Model a "Transformational Pedagogy"

A transformational pedagogy must investigate both what teacher leaders know and how they know it, or address both informational and transformation learning. Kegan (2000) and Drago-Severson (2004) distinguished the two in this way: Informational learning involves increases in knowledge and skills, which are important to change adults' attitudes and possibly their competencies. Transformational learning helps develop adults' capacities to better manage the complexities of work and life. Drago-Severson stated that "informational learning—new skills and information—increases what a person knows, whereas transformational learning changes how a person knows…" (p. 23). Both informational and transformational learning opportunities are important in graduate education for teacher leaders. However, "initiatives supportive of transformational learning can help us develop a heightened awareness of our assumptions so that we can examine their influence on performance" (Drago-Severson, p. 23). Thus, transformational learning enhances an adult's cognitive, interpersonal, and intrapersonal capacity to manage the complexities of work.

Two keys to enhancing transformational learning are first, attention to the context or holding environment provided to adult learners; and second, attention to the ways adults interpret their experience (Cooper, 2002; Drago-Severson, 2004; Kegan, 1994). The holding environment must consider the goodness of fit, or the match between the adult's way

of knowing and the holding environment. Holding environments include not only the organization itself, but a person or group. These elements serve three functions (Kegan, 2000). First it needs to hold well, honoring the sense making of the individuals in it. Next, it needs to let go, when the person is ready to move to a new meaning making system. Finally, the environment needs to stick around, or provide continuity and stability while the adult constructs new ways of being and relating to others (Drago-Severson). Providing continuity for new leaders as they return to the field is a challenge few programs have addressed. Graduate education programs must be designed to serve adult students through their development at the university and to explicitly model the stages of the holding environment or professional learning community so school leaders can re-create such conditions at their schools.

The other key to enhancing transformational learning is attention to the ways adults interpret their experiences. Graduate education must be carefully structured so teacher leaders are supported to interpret their experiences as learners, teachers and leaders. Support includes: deliberate attention to reflection, regular creation of narrative, and multiple opportunities to link individual experiences to system-wide practices. For women and people of color who have historically been excluded from formal leadership roles, the movement toward a broader and societal interpretation of their experiences is essential to their individual transformation from disenfranchised workers to authors of their own understanding (Rusch, 2004; Shields, 2004).

Teachers in today's schools face a complex web of social and educational problems that often challenge them beyond their abilities (Kegan, 1994). They live in a world that chiefly focuses on the learning needs of children while ignoring the needs of the adults. Drago-Severson (2004) believed that schools need to be places where adults as well as children are learning and growing. When leadership is framed as *constructivist* in schools (Lambert, 2003), teachers' learning becomes an integral part of creating environments that support adult development.

Adult learners require substantial challenge and substantial support to be productive and successful. In her discussion of self-authorship, Baxter Magolda (1998) identified helpful instructional strategies: respect for students' thinking; opportunities for exploration of multiple perspectives, as well as their own opportunities to construct their own perspectives, balancing them with external forces and experiences; and gaining strengthened confidence and internal identity. Self-knowledge and agency is understood within a community of practice. A democratic community must be in place for teachers to more fully inhabit an "activist professional identity." Sachs (1999) argued that:

> …a revised professional identity requires a new form of professionalism and engagement. Redefining teacher professional identity as an activist identity involves two main elements; the effort to shed the shackles of the past, thereby permitting a transformative attitude towards the future; and second, the aim of overcoming the illegitimate domination of some individuals or groups over others. (p. 7)

Activism requires self-authorship and agency. *Activism* runs counter to the prevailing winds of reform that often blow teachers toward the rocky shores of compliance. *Activism* may take the form of equity-focused advocacy, where teachers stand up against policies and procedures that contradict their values. Higher education faculty can support aspiring school leaders to connect their culturally-defined experiences to "leader-ship actions." We and they must examine assumptions about school leadership from multiple cultural perspectives in a variety of situations. Shields (2004) outlined the necessity for reinterpretation of experience, especially for teachers who do not fit the mainstream image of "leader:"

> We must develop a new and more open approach to difference; under-standing it is an intrinsic aspect of daily life—expecting to encounter difference on a daily basis, refusing to pathologize it, but accepting it and coming to understand it by placing dialogic interactions and positive relationships at the center of moral practice. (p. 110)

Faculty can encourage each other and our aspiring school leaders to interrogate our beliefs about our qualifications as current or former teachers and articulate implications of how aspiring leaders will work directly and efficaciously with and as teacher leaders. We can integrate more diverse readings about educational leaders, including autobio-graphic material from women and leaders of color (for example, see Benham & Cooper, 1997; Benham, 1997, Bloom & Erlandson, 2003). All aspiring school leaders need to think cross-culturally (including gender and class) about who can lead and ways they lead, not just about how to lead. We can also recognize moral and ethical stances taken by teachers in our programs. For example, when bilingual teachers become the cultural boundary spanners between second-language communities and the school, their roles as community advocates must be recognized as leadership. Too often, teachers associated with marginalized populations become marginalized themselves.

Faculty members must be deliberate about addressing institutional inequity at all levels and become students of cultural difference them-selves. Rusch (2004) reviewed research on educational administration programs' pedagogy and found that issues of equity continue to be ignored.

> The lack of adequate knowledge or valuing of equity and diversity among

faculty in educational administration classrooms results in shock, anger and frustration for students. Individuals in educational administration programs recount 'no real discussions' that critique law and policy for equity perspectives or note a persistent reification of research that ignores gender as problematic. (p. 17)

We can and must create professional learning communities in educational administration programs so aspiring leaders can examine their professional identities and carry out their goals in broader and more expansive roles. Each of them will need plenty of experience making sense of self, role, and responsibility as they step back into their schools to carry forward with their work.

What Teacher Leaders Can Do at Their Schools

Awareness of and reflection about how we enact and sustain bold, socially responsible leadership within the university classroom is necessary but not sufficient to support reform in schools. How can we coach and support our school-based colleagues to move through transitions in professional identity within their schools? How can our already courageous colleagues fully inhabit the leader within? Aspiring leaders and their coaches must identify supports and barriers to teacher leadership in three areas: conditions within the educational context, conditions outside the educational context, and internal motivation (Zinn, 1997). If they can fully understand the power of these forces to shape their professional identity, they will be better prepared to lead.

Supports and Barriers to Teacher Leadership

Teachers must recognize the conditions that influence professional identity as they transit leadership roles and be proactive in managing those conditions. Teacher leaders who are aware of the predictable tensions within leadership will be better positioned to maintain their integrity. Indeed, teacher leaders who are familiar with the literature cited here can take seriously personal factors that limit their leadership potential. Zinn (1997) thoroughly reviewed supports and barriers to teacher leadership, beginning with those within the educational context. She noted that the literature "offers far more limited discussion of internal, intellectual and psycho-social factors and is nearly silent regarding conditions outside the educational context . . ." (p. 2). Her own findings, however, suggest internalized (cultural), and external (societal) beliefs powerfully shaped teacher leaders' experiences. Zinn described her nine participants briefly, with attention to their gender and race. One of nine is identified as an Hispanic man and the only male in the study,

one as an Hispanic woman, one as a Japanese-American woman, and one as a White Quaker woman. The others are White women as well. She notes that participants worked in schools that serve low-income, heavily-migrant, English-second language communities.

Zinn's supports and barriers occurred in three areas. The first is *conditions within the educational context*, where supports included personal network providing collegial support, support of and modeling by administrators, and training of leadership skills. Examples of barriers included insufficient time during school day and year, lack of support and involvement of other teachers, and ill-defined and overly-broad leadership roles. *Conditions outside the educational context* present support as primarily encouragement of family and friends. Barriers begin with lack of support of family and friends but also include personal health problems and cultural or religious beliefs. Finally, *internal motivations* describe teachers' own strong convictions which support them to take leadership roles even while experiencing discomfort with taking risks, being the pioneer, and distancing themselves from colleagues. A barrier is that they feel a lack of expertise. The women in the study gave examples about implicit or explicit messages to *not* take leadership roles. This well-wrought study focused initially on roles and responsibilities, and the tensions teachers experience when they take those roles on. But when individuals were interviewed about their experiences, deeply personal concerns were illuminated.

For leaders to fully become bold and socially responsible, they must have multiple ways and means to examine the source of their internal motivation. Professional identity is rooted in personal life story and experience, and the excavation of those roots must be deliberate and ongoing. For aspiring school leaders who are women and people of color, the need is especially critical. They will continue to face greater obstacles to full recognition as leaders as they move into new and more public roles. Leaders who have been marginalized first as students and then later as professionals bring a lifetime of experience to transform classrooms and schools. Formal leadership development that recognizes multiple ways of learning supports teachers' capacity to challenge immoral and inequitable education.

Professional identity of teacher leaders is everyone's business, from peers in schools to faculty in educational administration programs. Development of professional identity is an area that merits further study. Faculty members who teach in principal preparation programs are also preparing teacher leaders: some aspiring principals may choose other roles, such as content specialist, coach, or department chair. Teacher leaders are taking more formal coursework in leadership so they can

more fully take transformative action at their sites. Within our preparation programs, we must address the importance of professional identity in ways that will serve aspiring school leaders whether they become principals or teacher leaders. Our own classrooms must be models of democratic learning communities so aspiring leaders will experience the levels of discernment described here. University-based faculty must strive to enact bold, socially responsible educational leadership.

When our classes of aspiring leaders come into our programs, do we ask our new colleagues to reflect on the conditions outside the educational context that might limit their full engagement in positional leadership? Do we talk honestly with women and colleagues of color about how they have been socialized into or away from positional leadership roles? We educational administration faculty and field supervisors are products of the very systems that limit the potential of teacher leaders. Rather than ask individuals to check their lives at the door, we must fully embrace the whole, adult student and welcome the multiple perspectives on leadership each brings. We must commit ourselves to preparing and influencing teacher leaders, continue to question why schools are "managed" the way they are, and accept the different values teacher leaders may bring.

Katzenmeyer and Moller (2001) made the following recommendations:

> Several factors are critical in forwarding the cause of teacher leadership. First, the educational leaders in the schools and school districts must be committed to taking action in support of teacher leadership . . . second, it means structuring an organizational environment and school contexts in which teachers can develop and be sustained in leadership roles . . . finally, there must be a widespread recognition of the development of teacher leaders as one of the catalysts that will propel school reform into the new century. (p. 124)

Let us recognize and acknowledge places and spaces where teachers and principals already enact bold, socially responsible leadership. With our students, we can take responsibility for the ways in which our professional identities position us to lead more powerfully. Together we can seek ways to work more effectively for the benefit of students and families, rather than debating who should do which role. If the purpose of school leadership is to "ensure a quality education for every child," we must open our minds and hearts to the reality that reframing education may mean reframing our notions of who we are as professionals. It is a common complaint in the reform business that "adult problems" get in the way of transformation. Until we can look honestly at ourselves and our work, children and families will continue to be ill-served. By internalizing and fully embracing the values of moral and ethical

leadership, we can move beyond the institutional limitations we ourselves have created. If teaching is a vocation, then leadership is a true calling worthy of discernment.

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