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Leadership in education

School leadership roles and standards: Observations from the International Study of Teacher Leadership

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ABSTRACT

This report summarizes the findings of the *International Study of Teacher Leadership* (ISTL), conducted in 12 countries. The researchers share descriptions of the increasing interest in *teacher leadership* as a factor in student learning and school improvement. ISTL researchers focus primarily on classroom-based teachers who—in collaboration with formal school leaders, parents, community members, and colleagues—impact school-wide decision making and pedagogical practices.

The report offers insights related to teacher leader behaviours, the complexity of teacher leadership, how teacher leaders learn to lead, and the importance of contextual factors that support and impede teachers who provide informal leadership to schools and the communities they serve. The researchers compare cross-cultural requirements of good leadership and offer contextually situated analyses of leadership visions and goals, the impact of teacher leadership on educational outcomes, necessary preconditions for effective leadership, and policies that develop teacher leadership.

The researchers also describe the readiness of school communities to embrace teacher leadership, described variously as parallel leadership, shared leadership, and distributed leadership. The report argues for a shift from considering *standards for teacher leadership*—too often based on the assumption that leadership is consistent across cultural and organizational settings—to the more flexible and contextualized conceptualization of *leadership dimensions* such as purpose, self-awareness, intentionality, and culture building. The ISTL researchers also argue that teacher leadership is but one component of an integrated approach to educational governance that addresses the complexities of teaching and learning in relation to rapid socioeconomic change, global migration, political tensions, and the emergence of new technologies. The ISTL also reinforces the ongoing importance of classroom teachers in the achievement of educational objectives. The ISTL team concludes this report with a set of research recommendations.

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1. Introduction

Large-scale studies, including the *International Successful School Principalship Project* (Gurr and Moyi, 2022) and the *International Study of Principal Preparation*, (Slater et al., 2018), reflected widespread interest (Evers and Lakomski, 2022; Leithwood et al., 2004; Murphy, 2023) in how educational leaders affect teaching and learning in schools. International studies such as these noted the importance of shared leadership among principals, teachers, students, and parents, although their primary focus was on school principals or headteachers.

However, Andrews and Crowther (2002) adopted the term *parallel leadership* to highlight what they described as the 'equivalent value of teacher leadership and principal leadership' (p. 156). Similarly, a recent account of *distributed leadership* (Harris et al., 2022) summarized how collaboration between formal and informal leaders in schools continues to be a valuable focus of researchers exploring the benefits of 'networking and professional community (p. 452).

The foregoing studies of both the principalship and shared leadership led to the *International Study of Teacher Leadership* (ISTL), a multi-stage cross-cultural study conducted by researchers in 12 countries (www.mru.ca/istl). The primary research question is 'How is teacher leadership conceptualized and enacted, and what are the implications for educational stakeholders?'

The ISTL research team was informed by a frequently cited explanation of teacher leadership as '…the process by which teachers, individually or collectively, influence their colleagues, principals, and other members of school communities to improve teaching and learning practices with the aim of increased student learning and achievement' (York-Barr and Duke, 2004, p. 287) . The *term teacher leadership* is part of an ongoing discussion of how formal leaders, such as principals and headteachers, may enhance school-community relationships and improve teaching and learning by sharing decision making with classroom-based teachers (Andrews and Crowther, 2002; Harris, 2003; Katzenmeyer and Moller, 1996, 2009; Lambert, 2003; York-Barr and Duke, 2004). Calls for shared principal-teacher leadership constitute a reaction to the historical perception that leadership is the domain of those holding formal leadership appointments (Dimmock, 2020; Leithwood, 2007), with insufficient recognition of how classroom teachers influence school-wide pedagogical practices and community support for schools.

Teacher leadership has emerged as a recognized field of study within the broader domain of educational leadership and management (Pan et al., 2023), although concerns have emerged that teacher leadership, as it is understood and applied in the West, may not be relevant or achievable elsewhere (Nguyen et al., 2020; Schott et al., 2020). For example, in some contexts, such as Spain, teacher leadership is not mentioned in institutional documents (Gratacós et al., 2021). In other countries, giving decision-making power to teachers could be perceived as opposing the role of the

principal. Also, cultural perspectives of feedback from peers or other members of the school may be considered a mechanism of control and not of aid (Gratacós and Vivas, 2023; Pineda-Báez et al., 2023).

The ISTL was designed to better understand contextualized manifestations of teacher leadership such as the examples provided in Table 1.

Table 1

Teacher Leader Manifestations in Western and Non-Western Contexts

Teacher Leader Attribute	**Western Context**	**Non-Western Context**
Accountability	Accountability sometimes perceived as a negative driver of change – Canada (Fullan, 2016) Teacher leaders intrinsically motivated to improve learning and social conditions – Canada (Webber, 2023b)	Department of Education expectation for a culture of responsibility and accountability – South Africa (van der Vyver et al., 2021)
Advocacy	Teacher leader focus on equity, diversity, and inclusion – Canada (Webber, 2023b)	Addressing historical inequities – South Africa (van der Vyver et al., 2023)
Cultural responsiveness	Teacher leaders hold formal appointments - Australia (Kahler-Viene et al., 2021)	Leadership is the domain of the principal – Mexico (Achach-Sonda and Cisneros-Cohernour, 2023) Teacher union opposition to formal teacher role called *teaching support leader* - Colombia (Pineda-Báez, 2021) No formal structures to encourage teacher collaboration and leadership – Morocco (Idelcadi, 2019; Idelcadi et al., 2020)
Collaboration	Requires principal support – Canada (Webber and Nickel, 2023)	Teacher leadership not recognized – Spain (Moral-Santaella and Sánchez-Lamolda, 2023) *Taxi teacher* phenomenon (teachers work in different schools) limits collaboration –

		Argentina (Vivas and Gratacós, 2023) and Mexico (Cisneros-Cohernour, 2021)
Openness to change	Teacher leaders work alongside principals in school improvement initiatives (Conway and Andrews, 2016b)	When there is support from principal and supervisors – Mexico (Cisneros-Cohernour, 2021) Informal teacher leaders can influence community social values - Spain (Gratacós et al., 2021)
Professionalism	Strong commitment to formal university education – Canada (Webber, 2023b)	Impeded when teachers are hired by the hour – Mexico (Cisneros-Cohernour, 2021) and Argentina (Vivas and Gratacós, 2023) Reform initiatives aim at re-professionalisation of teaching profession (Idelcadi et al., 2020)
Reflection	Whole school formal and informal leadership build capacity for critical reflection – Australia (Conway and Andrews, 2023)	Reflection sometimes addressed in relation to didactics, pedagogy, and psychology, but not in relation to the philosophy of education – Mexico, Colombia, and Spain (Fierro-Evans and Fortoul-Ollivier, 2021)
Risk-taking	Parent and community resistance to inquiry-based learning – Canada (Webber and Nickel, 2023)	Risk-taking rarely mentioned in institutional documents – Spain (Gratacós et al., 2021)
Shared vision	Teacher leaders and principals have a shared purpose for action - Australia (Andrews and Crowther, 2002)	A formal expectation of leaders to facilitate a shared vision and common identity – Colombia (Pineda-Báez, 2021) Supportive principals most powerful factor related to teacher collaboration – Morocco (Elmeski et al., (2023)
Stability	Teacher leadership precarious unless enabled by the principal – Australia (Andrews and Crowther, 2002).	Teacher leadership stifled and not sustained without policy initiatives to nurture and support teacher leadership – Morocco (Elmeski et al., 2023)

Teamwork	Teacher leaders lead professional learning communities - Australia (Conway and Andrews, 2016a)	Teamwork is a top-down process, focused more on pedagogical aspects and less on decision making in school communities - Colombia, Mexico, and Spain (Pineda-Báez et al., 2023)

The following is an account of key insights that emerged from conducting the ISTL in several countries. The insights fall within six themes: (1) teacher leader behaviours, (2) the complexity of teacher leadership, (3) learning to lead, (4) potential benefits of teacher leadership, (5) context, and (6) supports for teacher leadership.

That is followed by the suggestion that leadership roles and standards should be adapted to local conditions rather than imposed, sometimes inappropriately, across cultures. The report concludes with the presentation of a set of policy implications and recommendations.

2. ISTL Insights

The ISTL research team designed a six-stage study that first involved mapping the diverse understandings of teacher leadership held by the researchers. This was followed by detailed analyses of key documents, such as school authority and department of education policies, teaching standards, teacher education curricula, union statements, and accreditation requirements. Next, public perceptions of teacher leadership observed in the document analyses were juxtaposed with the findings of interviews that documented the individual understandings of teacher leadership held by classroom teachers, principals, and central office personnel. Subsequently, broader perceptions of teacher leadership were garnered by administering questionnaires to educators in public and private schools. Then, the lived experiences of teacher leaders were explored using case studies. The sixth stage of the research design consisted of oral histories with teachers identified by peers and formal leaders as highly influential.

The following sections draw heavily from recent summaries shared by Webber and Andrews (2023a); (Webber and Andrews, 2023b) and from ISTL reports from the countries represented by research team members (Okoko and Webber, 2021; Webber, 2023c). It is important to note that the insights are based on contexts in which shared leadership was observable. ISTL researchers also recognized situational conditions in which teacher leadership, as it is understood in the West, was less discernible. Unfavourable situations included principals with limited understanding of shared leadership and without the skills needed to build on

the informal leadership capacity of classroom teachers. Sometimes teachers themselves focused narrowly on their classroom responsibilities and perceived leadership as the responsibility of formal leaders. In other settings teachers were not perceived by themselves or school community members as professionals. More dire limitations resulted from political and social turmoil, widespread post-conflict trauma, and influxes of refugees fleeing violence or extreme poverty. It is with these cautions that the following perceptions are offered.

2.1. Teacher leader behaviours

The ISTL researchers observed a plethora of teacher leader behaviours. Most behaviours appeared to be the result of deeply held value and belief systems. With few exceptions, these individuals described their work as a mission, often in response to social injustices. They firmly believed that they could change lives and felt obligated to support and encourage learners and other teachers. They were committed to serving their school communities and to respecting the dignity of others. In turn, students and colleagues perceived teacher leaders as sincere and together they established mutually trusting relationships.

Teacher leaders also demonstrated high levels of professionalism. They engaged actively with and embraced personal responsibility for the sustenance of a shared vision for their schools. They valued professional learning and participated extensively in professional development opportunities offered by their schools, educational authorities, and postsecondary institutions. Teacher leaders sought innovation, and they were flexible, reflective, and resilient when initiatives had to be adapted to evolving circumstances.

Teacher leaders developed interpersonal skills that nurtured interpersonal communication and acceptance of diverse community members. They were effective team members and frequently were asked to lead work groups. They were able to take risks that others were reluctant to take. Importantly, teacher leaders established supportive relationships with their principals but were willing to question and challenge, even when those behaviours elicited resistance from formal leaders or other teachers.

2.2. The complexity of teacher leadership

The behaviours of teacher leaders were observed in the context of often difficult situations. Teacher leaders exercised positive influence despite the challenges of navigating highly complex community expectations, rapidly changing social conditions, and the politics of leading. It was often difficult for community members to fully appreciate the intensity of addressing competing expectations and sometimes conflicting curricular and pedagogical mandates.

Teacher leaders who participated in the ISTL research were able to balance traditional and changing role expectations and to lead change initiatives with little background knowledge of leadership. They exhibited career-long learning while participating in school improvement programming designed to address long standing issues that resulted from

socioeconomic diversity, colonization, and intergenerational trauma. They led while developing their personal understandings of cultural, linguistic, and religious effects on education.

Teacher leaders themselves did not escape limitations imposed because of their gender, social class, race, and educational background. Both women and men in some settings experienced discrimination because of the historical roles of their genders. Conflict management and team building skills needed to be developed in the workplace because they rarely were included in teacher preparation programs.

2.3. Learning to lead

ISTL findings included recognition that teachers at all career stages can be powerful informal influencers. However, their leadership may vary during different career stages. Despite limited opportunities for leadership development opportunities in most teacher education programs, the ISTL researchers concurred that teacher leadership should be part of preservice learning. In fact, some ISTL reports described the benefits of mentoring teacher education students in their development of leadership knowledge, skills, and competencies.

Early career exposure to learning about leading may increase the probability that teachers will engage in leading throughout their careers. However, teacher educators may be reluctant to include learning about leadership in preservice programs that already are loaded heavily with courses and practica that focus on curricula, inclusive education, information technology, and assessment practices. Another weakness of many teacher preparation programs is that mentor teachers and university personnel may have classroom teaching backgrounds but not the knowledge acquired as teacher leaders themselves.

Nonetheless, the evidence garnered by ISTL researchers suggested that student learning and teacher learning are interrelated. Mentorship of preservice and early career teachers as leaders may be a significant factor in improving teaching and learning. Collaborating with colleagues can lead to new and innovative instructional strategies, creative curricula that facilitate personalized learning for students, and teambuilding skills. In short, facilitating teacher leadership skills and knowledge in preservice programs is likely to connect to enhanced professional responsibility, a higher capacity for reflection and self-awareness, and openness to continuous professional development.

2.4.Potential benefits

Teacher leadership, as observed by ISTL researchers, is a major contributor to school improvement. Teacher leaders can be powerful change agents who can influence colleagues and learners without the bureaucratic and political limitations often associated with formal leadership appointments. That is, they are not involved in the evaluation of their peers, nor are they required to liaise directly with system leaders, which allows them to operate in the relative absence of power differentials. They also are classroom based which means they are knowledgeable about students' learning needs

and the idiosyncrasies of their teaching colleagues, which positions them to facilitate innovative curriculum planning, implementation, and student assessment.

Teacher leaders influence most successfully when their informal leadership capacity is recognized and valued by the formal leaders in their schools. This type of supportive school improvement context allows teacher leaders to support formal leaders and to mitigate tensions between teachers and principals that invariably arise when change initiatives are introduced.

2.5. Context of leading

The ISTL researchers conducted their collaborative research because of the widening impact of the concept of teacher leadership and of its intended and unintended consequences. Teacher leadership is situational. That is, every culture is different and so is every school. As a result, how and if teacher leaders influence learners and colleagues will vary according to contextual conditions. Indeed, the success of school improvement plans depends upon their alignment with local cultures.

Another important factor is the capacity of teachers to recognize that they cannot be neutral influences in their schools. If they accept and comply with cultural parameters, then that behaviour reinforces established professional norms and practices. If they are reluctant to accept existing values and beliefs, then they will challenge the school culture.

Of course, teacher leaders are not necessarily always positive influencers, and it is possible for them to introduce toxic dimensions to a school culture that seriously impede school improvement. Teachers who exist as either compliant or challenging members of a school community will help to determine the evolution of the school culture. However, it is significant that transparency in developing school goals and teacher participation in accomplishing them can dilute toxicity. That is, positive school cultures are promoted by school managers who create spaces for teacher dialogue, reflection, and participation. This was documented in a case study report of 24 schools in four Spanish urban environments in Barcelona, Seville, Madrid, and Valencia (Pàmies-Rovira et al., 2016).

2.6. Support for teacher leadership

Teacher leadership is a term with inherent appeal. However, it requires shared, responsible decision making rather than hierarchical, top-down decision making. Not all school communities are ready to support shared decision making and it may take a serious disruption to school culture to jolt teachers and principals into recognizing their need to collaborate. Only then will some principals and teachers be prepared to learn how to work together effectively and to reconstitute their professional identities so they can move from individualistic teaching in isolated classrooms to collaboration with peers and supervisors.

System support is another factor that influences the success of collaboration between formal and informal leaders in schools. Although schools should align their goals with those of the school authority, principals and teachers who seek

to establish collaborative practices in their schools also need the acceptance and encouragement of system leaders. Otherwise, membership in the professional staff assigned to schools may be impermanent and lack cohesion. Alignment of formal and informal leadership in schools can be described as a *top-down and bottom-up* leadership model, which allows for inclusive decision making and mutual trust.

2.7. Sharing leadership

Improved student achievement is the most frequently cited benefit of formal and informal leaders in schools sharing decision making. Indeed, the ISTL researchers who observed teacher leadership in its various forms, particularly when it manifested as a school-wide focus on teaching and learning, noted that a focus on pedagogical excellence was a strong outcome.

However, other benefits accrued when principals encouraged and validated teachers' participation in decision making. For instance, higher levels of teacher commitment and professionalism were evident. That is, both formal and informal leaders were more aware of their professional and legal responsibilities for student learning and welfare. That was accompanied by greater involvement in career long learning that developed leadership skills.

Another benefit was teachers' increased capacity as change agents able to navigate complex community expectations, social conditions, and political contexts. Teacher leaders contributed to more successful balancing of community expectations and teaching practices. Very important, successful shared decision making contributed to a school-wide culture of hope and innovation.

3. Cross-Cultural Comparative Perspectives

The preceding themes highlighted several important teacher leadership topics that are compared below in cultural contexts selected because of their relevance to each topic (See Figure 1.)

Figure 1

Cross-Cultural Perspectives of Teacher Leadership

3.1. What are the requirements of good leadership in education and how do they vary among countries and over time? *Australia and South Africa*

This section of the report explores teacher leaders' actions in two countries, South Africa and Australia, as an illustration of their roles within and beyond the school. While these two countries differ socially and culturally, teachers exercise both formal and informal leadership to guide others in taking socially responsible and accountable actions.

3.1.1. Role clarity

The roles of teacher leaders fall within formal and informal dimensions (Berg and Zoellick, 2018; Grant, 2006; Ozdemir and Kilinc, 2015). In the South African context, teachers' understanding of leadership is focused on exerting influence in formal roles such as heads of department, grade heads, subject leaders, union representatives, members of school management teams, and members of school governing bodies. In these formal appointments, influence is exerted using legal power and authority. However, teachers lead informally by acting as mentors or coaches for less experienced teachers and student educators. Informal teacher leaders do not have appointed authority and power and, as one participant reflected, they play a leadership role without a title.

In Australia, while there is acknowledgement of formal roles for teacher leaders, informal teacher leaders, given the opportunity, are at the front line of school improvement (Conway and Andrews, 2016b; Conway and Andrews, 2023;

Crowther et al., 2009). Teacher leaders have been observed leading school improvement initiatives, innovation, and pedagogical improvements (Andrews and Lewis, 2002; Crowther et al., 2009).

3.1.2. Leadership expectations

Research from South Africa and Australia indicated that, while teacher leadership often just happens, there is a growing expectation that teachers will enact leadership. In South Africa, after the establishment of democracy in 1994, all spheres, including education, were expected to heal the divisions of the past. Teachers were assigned an official and legal responsibility for assuming leadership roles. The (DBE, 2016) required that teachers 'take on a leadership role in respect of the subject, learning area or phase, if required' (p. A18) and senior teachers should 'act as mentor and coach for less experienced teachers' (p. A23). Further, in the Norms and Standards for Educators document (MOE, 2000) the key roles of educators include acting as a 'leader, administrator, and manager' (p. A47). In South Africa, teacher leaders are viewed as important agents in the restoration of social justice (van der Vyver et al., 2021; van der Vyver et al., 2023). They share this responsibility with educators in formal roles but exercise informal influence through passion and inspiration.

In Australia (Kahler-Viene et al., 2021) teacher leaders are acknowledged officially in national, state, and local contexts and are formally referred to as master teachers, pedagogical leaders, lead teachers, and middle level leaders. However, these teacher leaders act primarily in informal roles working alongside formal leaders—leaders of learning, deputy principals, and principals—to improve the life chances of students within their care. Driven by moral purpose and provided with agency, they lead school improvement initiatives within their communities (Conway and Andrews, 2016b; Crowther, 2011).

3.1.3. Qualities of teacher leaders

Teacher leaders fulfil their roles within different spheres of influence (van der Vyver et al., 2023; Webber et al., 2023). In South Africa teachers serve on decision making structures, for example, the school management team, the school governing body, and the disciplinary committee. Further, in a South African society characterized by unemployment and poverty, teachers help with fundraising events, while also exerting influence in arranging and leading extracurricular activities. Teachers are expected to "develop supportive relations with parents and other key persons and organizations based on a critical understanding of community and environmental development issues" (MOE, 2000, p. 85) and "understanding key community problems with particular emphasis on issues of poverty, health, environment, and political democracy" (p. 85).

In Australia, teacher leader actions also reflect the attributes of informal leaders. These include the capacity to facilitate communities of learning, to model and strive for pedagogical excellence, and to demonstrate the courage to confront barriers in school culture and structures by advocating for marginalized and disadvantaged students. They also have the

capacity to innovate and facilitate change because they are respected and trusted by their peers (Conway and Andrews, 2016b; Crowther et al., 2009).

Teacher leaders are successful at *managing up* and *leading down*. In Australia, a crucial feature of teachers effectively leading colleagues within the school is the enabling action of their principals. Described as parallel leadership (Andrews and Crowther, 2002; Conway, 2014; Conway and Andrews, 2016a) teacher leaders and principals collaboratively lead whole school improvement by focusing on shared purposes. Teacher leaders provide a supportive role in their relationships with parents, learners, colleagues, department heads, and the formal school management team.

In South Africa, teachers are expected to 'demonstrate an ability to develop a supportive and empowering environment for the learners and to respond to the educational and other needs of learners and fellow educators' (MOE, 2000, p. 47). Teacher leaders lead through teamwork, collaboration, and sharing professional duties. Teachers are asked to 'participate in school decision making structures' (MOE, 2000, p. 47) and to 'work with other practitioners in team teaching and participative decision making' (p. 50) and be involved in extramural activities such as 'sport, artistic and cultural activities' (p. 50). Also, teachers are viewed as leaders by many community members and often asked for advice on community matters. They formally have meetings with parents and serve on committees within the community, such as the police forum that offers security in the community.

3.1.4. Sustaining teacher leaders

Sustaining teacher leaders is precarious unless their agency is acknowledged within the school community, usually through enabling processes enacted by the principal (Andrews and Crowther, 2002). In fact, 'the culture of teaching should embrace a more organic form of whole school leadership' [and so doing utilize the capacity of those within the school to lead improvement] (Conway and Andrews, 2023, p. 316).

3.2. What vision and goals drive leadership in education and what are the signs of exercising positive influence? *Colombia and Kenya*

Leadership in education tends to be defined by how practitioners influence excellence in the achievement of specific goals of education identified in each context. Kenya is an example of a country where leadership practices are driven by the government's educational aims to ameliorate the heavy influence of its colonial heritage and to address societal aspirations (Okoko, 2020). The exam-oriented education culture where leadership excellence has been viewed in terms of student scores on national examinations is now being replaced by students' performance in the new competency-based curriculum (Amutabi, 2019).

The government of Kenya's strategic plans recognize the significant influence of school leadership on the achievement of the goals of education (Republic of Kenya, 2012) . The influence of teacher leadership manifests in the formal structure of education as a developmental process of personal and professional growth (Okoko, 2020). It is framed by policies and practices that define teacher leadership roles as individuals move through ranks and career progression, for

example, from classroom teacher to head of subject or department, or deputy headteachers to principal (Teachers Service Commission, 2019). The policies and roles, by default, define who principals and teacher leaders influence, and the extent of their influence.

Similarly, in Colombia excellence is associated with achievement in national standardized tests and is heavily influenced by the goals proposed by international agencies such as the OECD. However, the influence of those agencies has been strongly criticized for its emphasis on school management and for responding to purely economic interests of the global markets (Remolina-Caviedes, 2019). Research in Colombia suggests that the pressure from international agencies forces the curriculum to be standardized and irrelevant for functionally diverse student populations (Pineda-Báez et al., 2023). However, teacher leaders have challenged the exam-oriented culture that tends to prevail in Colombian schools by proposing alternative curricula more oriented to specific context needs and more focused on teamwork (Pineda-Báez et al., 2023).

Data gathered from ISTL members on how teacher leadership is experienced in 12 countries revealed how teacher leaders influence can be felt at the organization level when they co-create and promote school goals in order to develop a school culture and legacy (Arden and Okoko, 2021). In Colombia, for example, teacher leaders facilitate school-wide readiness by challenging dominant school cultures. They focus on creating a culture of hope, on motivating their peers to change their pedagogical practices and on working collectively (Conway et al., 2023; Pineda-Báez et al., 2023). Planning is a priority as it involves others in participating in self-developed projects that usually count on the financial support of industry, banks, or other organizations. In Kenya, teachers are known to lead professional development or donor funded curriculum renewal initiatives (Okoko et al., 2017).

Influence is also enacted through pedagogical endeavours that formally call on teacher leaders' expertise to lead curriculum and pedagogical innovations, usually by focusing on a profound examination of the school context (Conway et al, 2023). Teacher leaders are also invited to engage in professional learning, and social pedagogical missions where they work with others to build and connect with knowledge and skills that enable collaboration to enrich the school community (Arden and Okoko, 2021). The ultimate goal is to ensure that all children learn, and that knowledge is contextually bound (Conway et al., 2023). Leadership emerges through excellence in voluntary but valued co-curricular endeavours such as art, music, sports, and extra-curricular activities. In the case of Kenya, such voluntary leadership is instrumental in the appraisal for promotion and appointments to formal leadership (Teachers Service Commission, 2019).

Teacher leadership influence is evidenced when teachers challenge themselves to be agents of change. In countries like Kenya and Colombia this implies enacting social justice and seeking solutions to societal problems. Teachers choose to go beyond their day-to-day teaching to lead either social justice or system change. The study by Arden and Okoko (2021) revealed how such leadership manifests in countries like Colombia, Mexico and Kenya when teachers lead social

justice and advocacy initiatives that are aimed at 'breaking down what are seen as oppressive and dysfunctional systems that are supported by old ways of thinking about education, teachers, and teachers' work' (Arden and Okoko, 2021, p. 85), while seeking solutions to societal problems that hinder students from engaging or thriving in the school or in the community. Some of the issues include poverty, gender inequality, violence and crime, and learning to address social disadvantage and inequality (Okoko et al., 2017). Other factors include disengagement and disenchantment with school and providing students with emotional support (Conway et al., 2023) and assisting them with family problems (Okoko, 2020). Advocacy also involves looking after other teachers. The study by Arden and Okoko (2021) revealed how teachers in South Africa, South America, and Central Europe, exemplify leadership by work with others to challenge or disrupt the status quo for system change, especially through unions. They lead voices or speak out for the profession addressing concerns about teacher wellbeing (van der Vyver et al., 2023).

In Canada and Kenya, teachers are required to participate in a certified program. In cases like Colombia the absence of standards for teacher leaders is notable and leadership is hierarchical in nature as it is associated with the role of principals (Pineda-Báez, 2021). The motivation to become a teacher leader is more personal and driven by a strong sense of altruism and, although there are policies for professional mobility, there is no formal career ladder. Professional mobility is associated with increases in salaries (Conway et al., 2023). Although there is not a clear path for teachers to become leaders, almost all countries have a pathway that honours teachers' experience over time (Okoko, 2020).

3.3. To what extent and through what practices does the exercise of leadership contribute to better education outcomes? *Mexico and Canada*

There is a dearth of empirical evidence about the impact of teacher leadership on student achievement (Schott et al., 2020; Wenner and Campbell, 2017; York-Barr and Duke, 2004). Shen et al. (2020) conducted a meta-analysis of the connections between teacher leadership and student achievement which led them to conclude that there is but a small statistically significant positive relationship between teacher leadership and student achievement that may not be causal. Shen et al. (2020) further noted the confounding influence of school context, parallel to previous calls for consideration of contextual factors on educational leaders (Hallinger, 2018).

The following discussion of teacher leadership, in relation to Mexico and the Canadian province of Alberta, underscores the wide variance in how teacher leadership is applied. It demonstrates the influence of teacher leadership on policy, professional standards, and professional practices, due largely to the intuitive attraction of teacher leadership rather than on a body of measurable evidence of impact on student achievement.

3.3.1. Socioeconomic and political contexts

Fierro-Evans and Fortoul-Ollivier (2021) described Mexico as a large republic with high levels of social inequality and internal violence. They suggested that teaching in Mexico occurs in difficult and complex contexts. Mexico is also a

nation with different Indigenous cultures and languages. Schools located in rural communities have less access to higher levels of education. They have a high percentage of students with Indigenous ancestry and a low socioeconomic status. Recent moves by the national government aimed to increase teaching salaries by 8.2% in 2023 and to implement a new curriculum supported by teacher training initiatives and an invitation to teachers to participate in co-designing educational programs (BMI, 2023).

The education system in Alberta, Canada, serves a highly diverse population from a multitude of cultural, linguistic, and religious backgrounds. The system is regularly described as one of the top achieving in the world (Conference Board of Canada, 2014; Dehaas, 2011; Staples, 2016). School choice is widespread in the form of public, parochial, and independent schools. It is important to note that learners in First Nations communities, remote regions, and lower socioeconomic populations perform at lower levels relative to mainstream students (Webber and Nickel, 2020).

3.3.2. Recent government policies related to teacher leadership

Mexico's new federal curriculum, piloted in 2022, resulted from widespread consultation with teachers, students, parents, and community members. It is intended to address inequalities and racism, while moving toward a community rather than global focus. It is meant to be more humanist and less neoliberal, and to move away from 'standardized tests that segregate society' (Mexico News Daily, 2022, p. 1). The government stated that the new curriculum will provide greater professional autonomy to classroom teachers.

The introduction of a new curriculum in Alberta, also in 2022, led the education system in a different direction, from progressive inquiry-based learning to more direct approaches to teaching literacy, numeracy, citizenship, and practical skills (Webber, 2023a). This new curriculum, opposed by the provincial teachers' union, was accompanied in 2023 by updated professional practice standards that outlined the ways teachers are expected to lead and exercise influence in their classrooms and communities (Alberta Education, 2023).

While the new curricula and expectations for teacher professional development in Mexico and Alberta, Canada, are intended to facilitate teacher autonomy and leadership, they occur in different cultural and socioeconomic contexts. The policies in both settings seek to improve student achievement but baseline achievement levels are far apart. Further, the Mexican context includes a move away from standardized assessment, while the policy for mandatory standardized tests in Alberta includes local performance targets and public plans to use assessment results to improve student achievement (Government of Alberta, 2023a, 2023b).

3.3.3. Opportunities to lead informally

Recent policy initiatives in Mexico are intended to be implemented by School Technical Councils formed by teachers and school leaders, with school-community relationships facilitated by Social Participation Councils comprised of parents, principals, teachers, union representatives, former students, and community members (OECD, 2018; Secretaría de

Gobierno, 2017). The two types of councils will be impacted by recent budget reductions of $7 billion for basic education and $1 billion for teacher training (Pedraza, 2023).

School councils in Alberta schools include parent, teacher, and principal representatives (Government of Alberta 2023c). However, their role is advisory to school principals and meant to foster relations between schools and communities. Expectations for teacher behaviours are provided in the Teaching Quality Standard (Alberta Education, 2023) and the Code of Professional Conduct for Teachers and Teacher Leaders (Government of Alberta, 2023d). Case study and oral history reports of teacher leaders in Alberta indicate high levels of teacher professionalism, concurrent with multiple opportunities for classroom teachers to provide informal leadership in a host of influential within-school, community, and provincial educational committees (Webber, 2023b; Webber and Nickel, 2022; Webber et al., 2023).

3.3.4. Teacher leader innovations

Despite cultural differences, educational entrepreneurship thrives in both Mexico and Alberta, Canada. A small school in Mexico operates successfully with no formal leader which speaks to the strong commitment of a three-teacher leadership team that organizes school operations, including staffing and budgeting (Cisneros-Cohernour, 2021). Other research in Mexico highlights the importance of positive professional relationships in the success of innovations (Achach-Sonda, 2021).

Teacher leaders in Alberta have introduced successful school outreach programs such as the Chevron Open Minds (Calgary Board of Education, 2023). Teachers submit proposals for their students to participate in learning activities in a host of community sites, including fine arts facilities, city hall, museums, zoos, and more. Other examples of innovation led by classroom teachers in Alberta demonstrate their unusually strong personal commitment to formal university education and their altruistic motivation to improve social conditions for students and colleagues (Webber, 2023b).

3.3.5. Limiting factors

None of the teacher leaders studied in Mexico and Alberta, Canada, want to become principals or vice principals. They resisted invitations to accept formal leadership appointments because they found their classroom bases so rewarding and, perhaps counterintuitively, feel that formal positions would limit their capacity to lead.

Other restrictions included few role models, reluctance to assume heavier workloads, unsupportive principals, and antagonistic responses from other classroom teachers who perceive the teacher leaders as overstepping (Webber, 2023b; Webber and Nickel, 2022). Some teachers also reported that they saw leadership as the domain of principals, not classroom teachers.

3.3.6. Impact reconsidered

Despite the shortage of measurable evidence that teacher leadership directly improves student achievement, government policies and practices in Mexico and Alberta that were influenced by the international popularity of the

teacher leader concept led to a range of observable behaviours that, based on ISTL findings (Okoko and Webber, 2021; Webber, 2023c), enhance teaching and learning and school improvement. That is, teacher leaders seek ongoing improvements to school-wide instructional practices. They are change agents who serve voluntarily as informal influencers. They function without the burdens of formal leadership. Most are classroom-based and are well positioned to engage in non-traditional instruction and assessment. They facilitate teacher cooperation, shared commitment, and continuing professional learning. They are transformative agents who, counterintuitively, facilitate teamwork while challenging top-down decision-making and ameliorating pedagogical tensions.

3.4. What social, cultural, governance or other preconditions are needed for the effective exercise of leadership in education? *Morocco, South Africa, and Australia*

This question is prefaced by an understanding of context as the surroundings and circumstances that determine, specify, or clarify thought or action. The following is a synopsis of the social, cultural, governance, and other preconditions needed for the effective exercise of teacher leadership in education from three different countries, Australia, Morocco, and South Africa.

3.4.1. Social preconditions

Social preconditions for teacher leadership are presented as the features of teachers and their circumstances within and beyond their school communities. Across the three countries, teachers share a common propensity to advocate for the needs of students, albeit variable within specific contexts. In Australia, the *lead teacher* (AITSL, 2017) influences development of pedagogy in increasingly diversified schools, mentors early career peers, and contributes to school improvements (AITSL, 2017). Lead teacher is the terminology given to the highest standard for teachers in the AITSL framework. In Morocco, the 2015 – 2030 Strategic Vision for Education and Training (HCETSR, 2015) described the mission of teachers as educational and social. Simultaneously, Elmeski (2015) highlighted teachers' social and instructional leadership as a manifestation of effective school leadership.

In Australia, Crowther et al. (2009) and Conway and Andrews (2022) noted that teachers of leadership capability need recognition and support in their informal contributions to leadership. Similarly, in Morocco, teachers exercise leadership through their strong presence in unions, advocacy groups, and political parties (Bennani-Chraïbi, 2021). It is important that teachers' political engagement serves the improvement of teaching and learning effectiveness as well as the betterment of teachers' socio-economic conditions. In turn, expanding influence to promote professionalization and learning improvement is a leadership development shift that entails transformations of the support and management cultures to nurture teachers' meaningful influence inside and outside school (Elmeski et al., 2023).

In South Africa, the increasing prevalence of disadvantaged schools requires teachers to take the lead within their communities and schools. However, their enactment of leadership is juxtaposed between the pressing social conditions

for teachers to be involved in decision-making, and the political and union push-back against their actions as teacher leaders (Makoelle and Makhalemele, 2020).

3.4.2. Cultural preconditions

Cultural preconditions for the effective exercise of teacher leadership are rooted in the values attached to teachers and teaching as a profession. Prior to the universalization of formal schooling in Morocco, teachers had historically enjoyed a venerated status as community leaders entrusted with Koran memorization, literacy development, leading prayers, overseeing funerals, and officiating marriages (Boukamhi, 2004; Tawil, 2006). As the 2035 New Development Model (Special Commission for the Development Model, 2021) aims at rebuilding trust between teachers and the wider community, identifying ways to strengthen teachers' relevance as community leaders is one improvement area.

In Australia, teachers need to be increasingly cognizant of the diversity of student demographics to improve advocacy of student achievement both within and beyond the school environment (Conway and Andrews, 2016a). Likewise, the diversity of cultures within a single school environment in South Africa underscores the role of *culturally responsive* teacher leaders (van der Vyver et al., 2021) in addressing violence, cultural tensions, and poverty. Culturally responsive teacher leaders underpin school and system cultures. However, it requires shared decision-making and support for teacher leadership (van der Vyver et al., 2021).

3.4.3. Governance preconditions

Governance preconditions refer to the processes required for the development and enactment of teacher leadership in schools and systems. In Australia, teacher leaders need to demonstrate attributes in a range of ways relating to self, others, and the wider community (AITSL, 2017). Simultaneously, teacher leaders need to be consulted and engaged in strategic planning and policy development. This requires working in concert with principal leadership (Conway and Andrews, 2022). Similarly, teacher leadership is now enshrined in South African educational policy (DBE, 2016; MOE, 2000), but there is need for standardized specifications of teacher leaders' roles and responsibilities. Educational leadership is mostly associated with formal leadership positions whereas informal leadership needs appropriate recognition within schools and systems.

In Morocco, the School Development Plan, referred to as projet d'établissement in French and مشروع المؤسسة in Arabic, is the governance framework of teacher leadership. The School Development Plan articulates improvement goals, implementation strategies, and stakeholders' responsibilities (Ministry of Education, 2011). However, various evaluations indicate that regulatory frameworks alone do not liberate teachers' leadership (HCETSR, 2008, 2014; Thompson et al., 2017). The growth of teachers as leaders entails authentic opportunities for shared decision-making, rather than merely marking presence in school governance boards (Elmeski et al., 2023). Therefore, explicitly naming teacher leadership as a desired competency, and formalizing its requisite knowledge, dispositions, behaviors, and support structures, are foundational governance preconditions.

3.4.4. Other preconditions

The central theme for presenting other preconditions is focused on researching teacher leadership through evidence-based policies and practices. In Australia, despite an increase in publications about teacher leadership in formally recognized roles (Lipscombe et al., 2020), there is need for more case study research linking teacher leaders as integral to the process of school improvement (Conway and Andrews, 2016b; Conway and Andrews, 2023). As with peers in most nations, teachers in Australia need to navigate their margins for action, influence, and relevance in complex and volatile environments shaped by unionism, conflicting central and local political agendas, and societal expectations about teachers and principals meeting the needs of young people.

In Morocco, the research landscape for teacher leadership is nascent at best. Relatedly, a precondition for further research is policy acknowledgement of teacher leadership as a desired educational reform outcome. This necessitates a shift from the prevailing centralized reform engineering mindset into a distributed leadership approach that engages teachers as partners in school transformation. Finally, leadership in South Africa is regarded as essential for school improvement, but the focus is currently on training leaders in formal leadership positions. Therefore, there is dire need for development and training of teachers in informal leadership capacity. Research regarding teacher leadership in South Africa is gaining momentum, but future research is essential to ensure enhanced enactment of teachers as leaders to be the much needed change agents (Makoelle and Makhalemele, 2020; van der Vyver et al., 2023).

Notwithstanding contextual complexities of varying contexts, teachers across the three countries are called to be on the frontline of educational, social, and cultural transformation. To foster and sustain their leadership, the review of context in the three countries underscores the centrality of aligning policies and support structures that engage and reward teacher leadership, while mitigating factors associated with teachers' inefficacy and burnout. The policies and support structures that should be aligned pertain to teacher selection, teacher development, and support of teacher leadership, teacher evaluation, as well as research on teacher leadership. Aligning these policies and support structures is a top-down, bottom-up, and middle out systems approach. Leaders at the local, regional, and central levels provide development opportunities, legal frameworks, incentives and spaces for teachers to enact their leadership.

3.5. What policy levers can be used to help develop leadership skills and how do such policies emerge around the world to respond to need? *Spain and Morocco*

ISTL researchers noted that nurturing teacher leadership should begin in initial teacher training and continue as part of professional development for practicing teachers (Elmeski et al., 2023; Tintoré et al., 2023). The focus should be on authentic teacher leaders who share responsibility with the principal and the rest of their colleagues for the improvement of schools. Further, professional learning communities should be fostered in schools for the exchange and modelling of useful pedagogical practices (Caena, 2021; Darling-Hammond et al., 2017; Elmeski et al., 2023; Sales et al., 2016).

3.5.1. Describing teacher leadership

In the Spanish and Moroccan educational systems, it is hard to find a clear definition of teacher leadership. The Spanish Ministry of Education and Vocational Training considers teachers to be central to the quality of the education system, but the identity of teacher leaders is not clearly defined. Interestingly, the debate about teachers as technicians or as professionals is heightened by the introduction of the figure of teacher leader. For instance, Spanish policy documents highlight the need for teacher participation in school government bodies and collaboration (BOE, 2006, 2020) but this appears as a vague statement of purpose and not as something consciously intended to strengthen collaborative environments in schools. The term leadership is scarcely used in educational policies (Gratacós et al., 2021) and, when it is, it refers to principals.

Recent educational reforms in Morocco shifted how leadership in schools is perceived. The Strategic Vision for Reform 2015-2030 (HCETSR, 2015) stressed the importance of leadership for school change and called for the (re)professionalisation of the teaching profession. However, a document analysis showed that it is still the leadership of school principals and district leaders that is considered legitimate (Idelcadi et al., 2020). Teachers are usually trained as implementers of reform rather than as change agents. More recently, the Ministry of Education launched the Leadership Schools' Project. It is an ambitious project which provides training and resources to lead change in schools. This is the first time that the term leadership has been used explicitly to refer to leadership teams in schools.

3.5.2. Initial teacher education

In Spain, there are no official plans to nurture teacher leadership. For example, in the initial and in-service training plans and programmes of the Autonomous Communities of Andalusia or Madrid (BOJA, 2014; Consejería de Presidencia – Comunidad de Madrid, 2017) there is no clear identification of teachers as leaders. Neither are there specific plans for the training of teacher leaders in the Faculties of Education in Spanish universities. ISTL researchers found just one pilot experience in Granada for the training of teacher leaders during the practicum (Moral-Santaella and Sánchez-Lamolda, 2023).

The *apprenticeship of observation*, widely criticized by teacher education researchers (Darling-Hammond et al., 2017), is the basic Spanish model for the training of future teachers during their internships. Preservice teachers observe a traditional classroom scenario where the concept of leadership is absent. The teachers observed by future teachers are perceived as technicians who apply classroom routines without consideration for innovation, change, improvement, or research into their practice (Moral Santaella, 2021). Mentor teachers capable of modelling teacher leadership are difficult to find (Moral-Santaella and Sánchez-Lamolda, 2023).

The lack of model schools and mentor teachers who understand and practice shared leadership, could be alleviated by initial teacher training programmes that include the study of teacher leadership (Moral-Santaella and Sánchez-Lamolda, 2023; Moral Santaella, 2021). Further, universities could address the resistance they show to innovative proposals such

the study of teacher leadership. In addition, school personnel should strive to establish professional learning communities, i.e., groups of teachers who work together for the improvement of student learning by supporting each other, reflecting together, and collaboratively seeking solutions to the school's teaching-learning problems. For these professional learning communities to emerge, there must be strong support from the principal, a high degree of trust among the members of the professional learning community, and conditions such as time and space for reflection.

3.5.3. Leading despite challenges

In Morocco, there are formal roles for teachers such as teacher coach, teacher mentor, and lead teacher (Idelcadi et al., 2020) . However, they are not explicitly referred to as leadership roles and several challenges may impede their impact. The first challenge is the adequacy of training. Most of the professional development sessions are sporadic and provided as *sit and get* workshops. Second, although teachers in informal leadership roles in Morocco maintain their normal workloads, many teachers lead informally by initiating projects, networking and sharing expertise, leading pedagogical innovations, and coaching students and colleagues (Idelcadi et al., 2023).

3.5.4. Sustaining teacher leadership

There is need to facilitate self-initiated leadership activities. There also need for school-based professional learning within professional learning communities. In Spain, teachers state that principals and colleagues are the ones who help them to develop as leaders (Gratacós and Ladrón de Guevara, 2023). However, the existence of individualistic school cultures makes it difficult for teachers to maintain leadership roles (Hernández de la Torre and Medina Herasme, 2014).

Policy initiatives that encourage the growth of teacher leadership do exist in the Moroccan educational system (Idelcadi, 2019; Idelcadi et al., 2020). However, it is understandings and acknowledgement of the leadership roles of teachers and adequate training that is lacking. Policy centralism stifles grassroots' initiatives and impedes the sustainability of informal leadership roles. The growth of teacher leadership requires both structural and cultural supports.

There are programmes that have been launched in several countries that celebrate the contribution of teacher leaders to school change. These programmes are either school-based or implemented through research-practice initiatives. Three examples that provide leadership training for teachers are the TLDW (teacher led development work) in the United Kingdom (Frost, 2014; Frost, 2017), the Teacher Learning and Leadership Program in Canada (Campbell et al., 2016; Lieberman et al., 2017), and the Australian Institute for Teaching and School Leadership programme (AITSL, 2017).

In the United Kingdom the work of the HertsCam Network (Frost, 2014; Frost, 2017), developing the programme TLDW, has focused on strategies to enhance teachers' professionalism and empower them as agents of change. This network promotes teacher leadership as dimension of teachers' professionalism rather than by virtue of formal designated role, supporting teachers' non- positional leadership. The strategy followed by this network is to collect stories of teacher leaders and share them on the network. The purpose is to amplify the voice of teachers and shows the link between

transformative action through which teachers like activists 'build knowledge and cultivate hope' (Frost, 2017, p. 7). These stories are about a *journey of hope* that teacher leaders take, keeping in mind that change is not only possible but also a moral obligation. Hope is an ontological necessity which must be the basis for transforming education through teacher leadership (Frost, 2014; Frost, 2017). The levels of progression of teacher leadership are as follows: teachers lead development work in their schools; experienced teachers act as facilitators to underpin teacher leadership; teachers collaborate to organize their own network, the infrastructure for knowledge creation; and teachers engage in advocacy by networking with large organizations to amplify their voice (Frost, 2017).

TLDW involves several steps as described by (Frost, 2013): clarifying values; identifying a professional concern; consulting colleagues about that concern; planning a project to address that concern; revisiting the action plan with colleagues; implementing the project; and networking and sharing professional knowledge. The TLDW aims at building leadership capacity in schools (Lambert, 2003). It rests on the belief that all teachers 'have the right, capability, and responsibility to be leaders (Lambert, 2003, p. 422).

The programme developed by Campbell et al. (2016) is a joint initiative through a partnership between the Ontario Teachers' Federation and the Ontario Ministry of Education with shared objectives to: support experienced teachers to undertake self-directed advanced professional development; develop teachers' leadership skills to share their professional learning and exemplary practices; and facilitate knowledge sharing for the dissemination and sustainability of effective and innovative practices' (Campbell et al., 2016, p. 1) , The impact of this project, which has been in place since 2007, shows how teachers' skills and competences are enhanced and how student engagement and learning are improved.

The Australian Institute for Teaching and School Leadership (AITSL, 2017) has developed The Australian Professional Standards for Teachers Programme, that helps teachers understand and develop their teaching practice. The programme progresses through a series of stages that conceptualize and define the teacher's task (from low skill and competence to high skill and competence): graduate, proficient, highly accomplished and lead. The final level of progression in the programme is to become a teacher leader. The standards set for each of the stages help and support teachers to reflect on their practice and to develop and grow their expertise. The standards are grouped into three domains of teaching: professional knowledge, professional practice and professional engagement. Within each standard, the focus areas provide further illustration of knowledge, practice, and professional engagement of teaching.

In Spain there are no programmes like those developed in the United Kingdom, Canada and Australia. The implementation of such programmes would necessitate a shift in how leadership is viewed. Teacher leadership cannot flourish in a context where only principal leadership is considered legitimate.

Counterintuitively, teachers can learn from leading development projects. Nurturing teacher leadership also can be supported by providing necessary funding and professional support as well as investments in principals' training to be able to facilitate a school culture based on trust and collaboration. As Idelcadi et al. (2023, p. 277) stated, 'teacher leadership is likely to emerge when teachers are provided with leadership opportunities, adequate support, and when they are encouraged to take action.'

4. School Leadership Roles and Standards

Teacher leadership—variously referred to as shared leadership, distributed leadership, parallel leadership and more—is situated in a range of international policy documents such as official teaching standards. It is an explicit and implicit component of how school personnel in Western and non-Western cultures are held accountable for meeting educational goals established by governments and international funding agencies. It is politicized in the context of arguments for and against funding increases and cuts by departments of education. It is used to describe the influence of both classroom-based teachers and teachers in quasi-formal appointments such as lead teachers or instructional leaders. It is used in these ways with only a few calls for consideration of cultural, political, and socioeconomic conditions, all of which clearly influence how students learn. This array of the use of the term teacher leadership is concurrent with ongoing calls for a clear definition of the term and for strategies for quantifying the impact of teacher leaders on student achievement.

It could be argued that decades-long uncertainty about the definition of teacher leadership and sparse empirical evidence of its impact render the construct of teacher leadership irrelevant. However, it also can be argued that the influence of teachers is a salient consideration in educational planning, staffing decisions, leadership development programming, and school improvement initiatives. Indeed, principals and headteachers–even those operating within hierarchical power structures–have long known from their experiences with change initiatives that the influence of classroom teachers unequivocally determines the success or failure of efforts to improve teaching and learning.

Because the ISTL research team members have argued that good leadership is contextualized, the following discussion of leadership roles and standards is based on the longstanding assumption that educators and policy makers have a responsibility to adapt policies and practices to local conditions rather than impose, in ways that can conflict with community values and practices, a concept described decades ago as mutual adaptation (House, 1986).

4.1. Skills and context

The value of researching teacher leadership may reside in its relevance to school improvement. That is, 'It may be enough to describe teacher leadership as the influence of classroom teachers in the interest of improving teaching and

learning' (Webber, 2023b, p. 92). With this description in mind, formal and informal educational leaders and policymakers can influence teacher leaders in their professional contexts. All stakeholders can reconsider how they recognise and support the strong professional commitment and altruistic motivations manifested by teacher leaders, such as the ones who participated in the ISTL. Most importantly, members of school communities may recognize the fragility of positive school cultures and aim to enact shared, professionally responsible, and contextualized decision-making in the best interests of all.

4.1.1. Readiness

Not all schools or cultural contexts are willing to embrace teacher leadership. Principals in many cultural contexts are unlikely to have studied shared decision-making or school improvement in their leadership development backgrounds. Moreover, they often have been socialized within hierarchical leadership frameworks by mentors who subscribed to autocratic decision-making. As a result, the principals may value compliance from classroom teachers and may resist their attempts to influence school operations and curriculum implementation.

Even when principals seek to develop an inclusive school culture and to facilitate shared, democratic decision making, they may not have the necessary leadership skills. Without access to professional development and mentorship, principals who implement change may be unaware that the process is likely to be fraught with uncertainty and heightened tensions among school community members until they all acquire skills at sharing responsibilities.

Moving from hierarchical to shared leadership usually requires principals and classroom teachers to shift from individualistic to collective professional identities. A desire to transform professional identities can be instigated by just one classroom teacher with an unusually strong sense of agency, or by a principal who is challenged by staff or community dissatisfaction with the status quo. Whatever the origin of a move to shared governance in a school community, teachers must move from professionally isolated classrooms to establish shared values with peers and formal leaders. They also need to develop mutual trust that can withstand the pressures of organizational change.

4.1.2. System support

School-based educators normally carry heavy workloads which means they must see value in working to maintain a distributed-decision making model which may increase their responsibilities. Because they may not have the skills and knowledge needed to sustain collaborative relationships, they require access to expert facilitation along with time and space for culture building and to negotiate their emergent roles and responsibilities. Only then can they progress toward a shared vision for their school community and establish collective goals. Because many school contexts involve ongoing changes in the principalship and new appointments of classroom teachers, the process of learning to work collaboratively is ongoing and must become routinized in the operation of the school community. (See Figure 2.)

Progression toward a sustainable shared decision-making model is rarely smooth so system support providers should recognize that both formal and informal school leaders may not be willing to risk engaging with organizational change if they believe it may jeopardize their career progression. Principals and their senior school authority supervisors especially need to establish trusting relationships and open communication, particularly if new governance practices challenge parent and community member expectations for how schools should operate.

Figure 2

Readiness, System Support, and Professional Learning Communities

4.1.3. Professional learning communities

Participation in effective shared decision-making processes is fragile and requires a wide range of collaboration skills. For instance, formal power imbalances can interfere with the sense of safety that is needed for open communication and information sharing. Thus, school community members must trust that there are established procedures for identifying concerns and goals that will lead to mutually acceptable decisions. Schools are frequently emotionally intense so stakeholders must establish communication patterns that they can rely upon to defuse tensions and resolve conflicts. To do that, formal and informal leaders should be able to know that there is a predictable pattern of information gathering, planning, implementation, review, and revision that they can anticipate and trust to allow adaptation and problem solving.

In addition to skill development, collaboration also requires shared beliefs that lead to a common vision for a school community. Improved student learning and achievement clearly must be valued and provide the motivation for teachers and principals to align their professional efforts. Accepting personal accountability for student learning has the potential to bring formal and informal leaders together in the pursuit of improved teaching and learning. In addition, sustainable decisions are unlikely to emerge without mutual respect among formal and informal leaders.

4.2. Evidence

Reports of the impact of school leadership on student achievement suggest a small but positive impact as measured by scores on standardized tests (Shen et al., 2020). Such large-scale quantitative research reports are valuable, with the caution that they highlight average performances, thereby obscuring contexts in which particularly impactful leadership practices result in exceptional improvements in student achievement (Leithwood et al., 2004). As a result, the ISTL researchers responded to longstanding calls for contextualized studies of how formal and informal school leaders create conditions that improve student learning (Hallinger and Heck, 1996).

Case study and oral history findings evidenced the attributes of individuals and school teams who are recognized by peers, supervisors, parents, and students as especially positive influences on school cultures (Conway and Andrews, 2023; Webber, 2023b; Webber and Nickel, 2023). Additionally, the administration of surveys (e.g., (Elmeski et al., 2023) profiled the features of school-based educators who participated in professional learning communities. The characteristics of teacher leaders that emerged in the ISTL research were focused in the areas of professional learning, intrinsic motivations, and willingness to question instructional practices.

The importance of contextualized studies must not be under-estimated. The measurement of the impact of teacher leadership on student achievement is always influenced by a range of contextual factors—social, economic, cultural, political—which all differ from one context to another. The qualitative evidence from the varying countries of the ISTL has evoked the most interesting insights.

4.2.1. Professional learning

Learning from peers through collaboration emerged as a factor that facilitated improvement in teaching, learning, and school management in Morocco (Elmeski et al., 2023). This finding was accompanied by the observation that a preponderance of teachers (over 68%) had at least an undergraduate degree with nearly 30% holding earned master's degrees, and another 1.5% holding or nearing completion of doctoral degrees. The observed connection between participation in collaborative school improvement initiatives and completion of formal degree programs indicates the value of ongoing access to structured professional learning. Interestingly, teachers who participated in advanced postsecondary studies also engaged actively in school and system-level professional development programming (Conway and Andrews, 2016a, 2016b; Webber, 2023b). The teacher leaders reported that they simply found professional learning intrinsically motivating.

Case study data garnered in an independent school in western Canada, with a strong reputation for sustaining a successful professional learning community, also included the observation that an unusually high number of school community members held completed master's and doctoral degrees. Those with advanced university degrees also participated extensively in in-school professional learning initiatives (Webber et al., 2023). These observations were complemented by observations in Australia that teacher leaders engaged enthusiastically in both university and professional learning opportunities (Conway and Andrews, 2023).

The perceived value of formal professional learning was corroborated by oral history findings (Webber, 2023b) that most of the classroom-based teachers, with remarkable achievements by their students in academic and athletic endeavours, held multiple undergraduate and graduate degrees. These impressive levels of professional and academic achievement were sometimes accompanied by backgrounds of national and international success in highly competitive sports (Webber and Nickel, 2023).

4.2.2. Intrinsic and altruistic motivations

Teacher leaders studied by the ISTL researchers manifested extraordinary commitment and altruism. They demonstrated consistent positivity and the self-perception that they possessed the capacity to achieve collective goals (Webber and Nickel, 2022). (Arden and Okoko, 2021) described teacher leadership as a social-pedagogical mission to build capacity, empower, and model active engagement with the school community. Pineda-Báez et al. (2020) noted teacher leaders in Colombia who were driven by their desire to facilitate social change and community improvement.

Teacher leaders in the Colombian context viewed themselves as leaders within their school communities (Pineda-Báez et al., 2020), while oral history participants in a large urban Catholic school district in Canada resisted being called leaders. They described themselves as leading by example according to their personal and professional values (Webber, 2023b). Even though the Colombian and Canadian teacher leaders held slightly different views about their self-perception as leaders, study participants in both cultural contexts declined opportunities to be appointed to formal

leadership positions as vice principals and principals, saying they felt most rewarded by exercising influence in their roles as classroom teachers.

4.2.3. Willingness to question

Teacher leaders described how a school culture of trust and shared understanding by teachers and principals of their collective work allowed them to sustain a sense of mutual accountability to one another. They felt that sharing a sense of mission empowered them to safely question and experiment, in the interest of the success of their school community (Webber and Nickel, 2022).

Although teacher leaders highlighted the importance of mutual trust and deep commitment, they demonstrated their willingness to be daring and provocative, despite the potential for career limiting responses from peers and supervisors. The ISTL researchers borrowed the term *edginess* (Walker, 2005) to describe how teacher leaders preferred non-confrontational approaches to problem solving but felt confident to challenge school and community expectations. For instance, they used curriculum implementation strategies, community service activities, and coaching venues to challenge what they felt were insufficiently examined assumptions about gender, politics, race, and religion. In most, but not all, instances teacher leaders' *edginess* was accepted or at least tolerated because of their concurrent efforts to maintain credibility and professional gravitas in their school communities.

4.3.Standards

Teacher leadership is well established in policy documents and research literature in many cultural settings but perhaps most dominantly in the context of the United States. An influential document, titled *Teacher Leader Model Standards* (Teacher Leader Exploratory Consortium, 2011) was produced by a group of prominent American educational researchers, practitioners, and representatives of professional organizations. It highlighted seven categories of teacher leader attributes, that subsequently were adopted by a host of school districts and states to guide leadership development, leadership competency assessments, and appointments to leadership positions (Berg et al., 2014). The seven domains are (1) Fostering a collaborative culture to support educator development and student learning, (2) Accessing and using research to improve practice and student learning, (3) Promoting professional learning for continuous improvement, (4) Facilitating improvements in instruction and student learning, (5) Promoting the use of assessments and data for school and district improvement, (6) Improving outreach and collaboration with families and community, and (7) Advocating for student learning and the profession.

ISTL researchers noted the spread of the teacher leader concept throughout the United States and other Western nations such as the United Kingdom, Canada, and Australia, for example, and then to non-Western contexts. It can be argued that the dimensions of teacher leadership contained in the American leadership model standards are relevant to the United States but also to virtually all nations. However, it also can be said that the model framework, terminology, and assumptions are premised on Western educational structures and cultural contexts, with insufficient attention to

their relevance to other nations with a wide range of social, economic, religious, and, in some cases, colonial histories. The specificity of using the standards from an American context is something that needs more focused research in each of the ISTL countries.

4.3.1. Responsibilities

The responsibilities outlined here relate to teachers in the first instance but are shared with recognition that the influence of teachers is just one component of the integrated operation of a school and education system. Teacher leader responsibilities require an aligned policy, professional learning, and governance infrastructure to be successful.

First, teacher leaders are responsible for attending to the well-being of children and youth and for optimizing their learning and capacity to contribute meaningfully to their societies during their lifetimes. Teachers also have a responsibility to recognize and adapt to the complexity of their professional contexts and accept the intensity that accompanies their role as community leaders. Their work is formal to the extent that they hold appointments as educators who are professionally, morally, and legally responsible for the well-being of learners. It is informal because their influence in school communities exists in their classrooms while extending far beyond the confines of schools.

Being a school community leader requires shifting from a self-identity as an implementer of mandated policies and curricula to that of a responsible professional who understands community values while also changing lives and addressing societal injustices and inequities. That is, teacher leaders are community culture builders, whether they are conscious of the magnitude of that responsibility.

Serving as a teacher leader in a modern world characterized by massive migration of people and ideas also requires high levels of cross-cultural literacy. Teachers must maintain a focus on values supported at least in principle by virtually all cultures—such as caring, respect for difference, and responsibility to safeguard those in need—while navigating political, religious, and cultural distinctions.

Underpinning teacher leaders' responsibilities is the recognition that culture building is fragile and simple to sabotage. Thus, teachers must utilize all the tools available to educators, such as determining student skills and knowledge in the form of observational assessments, teacher-constructed assessments, authentic assessments, and standardized examinations. Effective communication with school community members depends upon teachers' capacity to share all forms of information and data that relevant to learners and their caregivers. It is too easy to diffuse attention to learner welfare by engaging in inadequately informed dialogue about the types of data parents and community leaders want or should find useful.

4.3.2. Professional communication

A perspective to emerge from the ISTL is that there is merit to exploring leaders' communication by questioning structural inequality, racism, and societal injustice (Crabtree and Stephan, 2023) . As a result, the findings of the ISTL

suggest there are four spheres of influence and responsibility for teacher leaders—self, classroom, school, and community—all predicated upon intrapersonal and interpersonal communication (van der Vyver et al., 2023). The area of *self* is examined through critical reflection about professional practices and by challenging personal assumptions and beliefs, one of the more difficult components of framing teaching as a profession. Leadership in the *classroom* involves optimizing student learning by establishing strong teacher subject matter knowledge, providing advance organizers, and employing contextualized learning strategies, all while maintaining safe and trusting relationships with learners.

Communication within the *school* includes asking questions about where colleagues want their school to be five years into the future, what can they manage, and what might that look like. It employs a common vocabulary that facilitates community building and inclusion. For example, terms such as 'not my team but ours…,' 'our school,' and 'we.' Facilitation phrases such as 'that's a really good catch…,' 'that's a good question…,' 'a possibility is…,' and 'what if….?' have the potential to invite engagement and ownership (Webber et al., 2023).

Communication with *community* members includes soliciting and managing expectations, providing opportunities for input and collective reflection. Personal and written interactions among teachers, principals, students, parents, and community members facilitate whole school and whole community awareness of change initiatives, curriculum implementation, and cultural relevance. Strategies for communication include anticipating and regulating community tensions and conflict.

4.3.3. Learning cultures

Developing a learning culture in schools should begin in teacher education programs and be supported by ongoing professional development. Teacher preparation curricula should promote each teacher's sense of professional agency and leadership capacity. Program foci should attend to strategies for participating in planning and goal setting, strategizing for goal attainment, and relating shared leadership to school improvement. Preservice teachers benefit from learning what a professional learning culture is and how they can contribute to it throughout their careers. Leadership development in teacher education programs should foster the understanding that teacher leadership is not a discrete concept but something that must be integrated into shared decision making and school improvement.

Sustaining learning cultures in schools includes aligning both student and teacher learning models so they have parallel values, strategies, and expected outcomes. New staff members will benefit from being assigned an experienced mentor to help them understand the school culture, instructional and service expectations, and access in-school supports. Additional strategies for optimizing learning cultures in schools include expectations for annual professional growth plans that include engaging in work beyond teachers' own classrooms. Formalized leadership development programs for all staff may be led by informal leaders who do not hold appointments as principals or deputy principals. Utilization of unconventional knowledge sources can be drawn from the private sector and public information sources, in addition to traditional learning sources in postsecondary institutions (Webber and Nickel 2022).

4.3.4. Targeted supports

Support for shared leadership should be appropriate for readiness stages. Principals, teachers, students, and community members in each school are at different stages of understanding and of seeking ways to work together more effectively. Expectations for teacher leadership need to be managed because collaborative decision making takes time to implement and to become institutionalized.

Early-stage support should include introduction of preservice teachers to their potential as school community leaders, despite the possible resistance from university personnel (Moral-Santaella and Sánchez-Lamolda, 2023). It can be a challenge for teacher educators who may be disconnected from the work of teachers in schools and their lack of personal experience as school leaders. Nonetheless, attention to leadership development has the potential to promote more intentional success at meeting school and community goals.

Because principals too often are not socialized to share leadership and because they may lack the skills to facilitate collaboration, principal preparation programs should incorporate study of the value of resisting hierarchical decision-making structures. Principals should know how to encourage and validate innovation and creativity among classroom teachers. They also should acquire strategies for moving beyond the resistance to shared school improvement initiatives that may be encountered from some teachers and community members.

Operational supports include aligning school mission statements and goals with professional development, budget allocation, and staffing decisions. A sophisticated annual audit of school satisfaction among students, teachers, parents, and community members can provide direction. Meetings must have a clear and strategic focus to use time intentionally. Finally, formal and informal leaders benefit from coaching about how to facilitate meetings.

4.3.5. Shifting from standards to dimensions

Use of the term *leadership standards* suggests that the form and function of leadership are consistent across cultural and organizational settings. The ISTL research team (Webber, 2023b; Webber and Andrews, 2023a, 2023b) has argued that the context of shared leadership varies due to localized factors. Therefore, the term *leadership dimension* is offered here as a flexible and contextualized conceptualization of leadership that can be adapted, thereby avoiding the perils of using *standards* as ‘a weak mechanism for causing system change’ (Fullan, 2016, p. 540).

The observations of the ISTL researchers suggest six *leadership dimensions* that can and should be considered by formal and informal educational leaders and then contextually modified. (See Table 3.)

Table 3

Leadership Dimensions

Leadership Dimensions	Considerations
Purpose	• Focus on the well-being of children and youth • Optimize learners' capacity to contribute to their societies • Address societal injustices and inequities
Self-Awareness	• Challenge personal assumptions and beliefs • Resist hierarchical decision making • Recognize socialization influences
Intentionality	• Dream big • Honor professional, moral, and legal responsibilities • Validate innovation and creativity • Use time purposefully
Culture Building	• Value cross-cultural literacy • Recognize political, religious, and cultural distinctions • Understand community values • Know that culture building is fragile and simple to sabotage
Strategist	• Avoid thinking you know what community members want • Recognize and adapt to complexity • Solicit but manage expectations • Accept the emotional intensity that accompanies leading • De-escalate community tensions and conflicts • Audit school community satisfaction
Learner	• Develop professional agency and leadership capacity early • Coach and be coached • Use traditional and unconventional information sources • Align values and strategies for student and educator learning • Expect to experience different stages of understanding • Create annual personal professional growth plans

5. Policy Implications and Recommendations

Shared leadership in schools is but one component of an integrated approach to educational governance. Shared leadership is dependent on a degree of societal stability and freedom from entrenched autocratic decision making, along with a societal perception of teachers as professionals rather than technicians. Further, massive migrations of people fleeing political, economic, and social turmoil to other nations may diminish or even preclude progression toward shared decision making in the more immediate interest of sustaining a stable civil society.

Pressures on time, resources, and educational personnel may require rapid decision making by senior government and educational personnel. Recent influxes of refugees to countries such as Colombia, South Africa, Mexico, and Turkey, for example, have placed constraints on educational systems in terms of providing access to safe schools for learners who may be victims of trauma and stress. Other nations such as Australia, Canada, Germany, Spain, and the United State struggle to accommodate the children of migrant families in crowded and often understaffed schools. Therefore, it may be helpful to assess educational leadership capacity in schools by using a scale that reflects system stability, resources, and access to professional learning by formal and informal leaders. It is apparent that legislation alone does not ensure functional decision making in schools.

When supportive conditions are sufficiently in place then it is important that policy makers understand that shared educational governance is a central element of functioning democracies. When possible, school-district-state/provincial policy alignment will encourage the formalization of leadership expectations and establish parameters for decision making that honour cultural traditions and educational innovations.

ISTL findings suggest that teacher leadership is primarily related to culture building. Certainly, international standardized assessments, such as the Program for International Student Assessment, provide valuable benchmarks that inform decisions about resource allocation, teacher education, principal preparation, and curricular revisions. Nonetheless, the ISTL research team suggests that sharing decision making is less about quantitative measures, as useful as they are, and more about understanding and developing school cultures that demonstrate sensitivity to cultural, organizational, and learner differences.

6. Conclusion

Expectations for teacher accountability and effectiveness across cultures have increased during the age of globalization. It is more important than ever that teachers understand how to enhance their impact on student learning and to garner community support for their schools. As a result, school practitioners, researchers, and policy makers are keenly interested in school improvement strategies. The research literature underscores the importance of classroom teachers in the achievement of educational objectives (Bond, 2015; Crowther et al., 2009; Zepeda et al., 2013). Government policies and teacher evaluation frameworks in a plethora of countries support the involvement of teachers in sharing decision making with school principals. Researchers from Western nations have variously described the leadership function of classroom teachers as teacher leadership (Lambert, 2003), parallel leadership (Crowther, 2002); and distributed leadership (Harris, 2003), for example. All of these descriptors are based on the integration of formal and informal educational leadership but, according to several prominent researchers (Nguyen et al., 2020; Wenner and Campbell, 2017; York-Barr and Duke, 2004) there is a marked lack of clarity in the definition of the concepts.

Nonetheless, teacher leadership features prominently in teacher standards documents and teacher evaluation policies throughout Western cultures and in many other cultural contexts (Alberta Education, 2023; Teacher Leader Exploratory Consortium, 2011). The term has been used by teacher unions to resist the power and influence of principals (Hassani and Meuret, 2010) and to determine which teachers influence and how they lead (Mahlangu, 2019). Other reports of how teacher unions utilize the term teacher leadership in positive ways to contribute to professional learning (Bangs and MacBeath, 2012).

Despite the various manners in which teacher leadership is used to improve teaching and learning or as a political tool in ongoing debates about which organizations should wield power in educational decisions, it is difficult to argue against its relevance to school culture, professional development, and school improvement (Webber, 2021). There are numerous examples highlighted by the ISTL of how teacher leadership relates to principal leadership, the professionalization of teaching, and the need for teachers to address social inequalities. For these reasons alone, teacher leadership merits ongoing research into how it is understood and enacted.

RECOMMENDATIONS FOR COMMISSIONED RESEARCH

The ISTL led to the following recommendations for further research.

- How transferable across cultures is shared educational governance?
- What types of influence do teacher unions exert in the success or failure of shared education governance?
- Why do many classroom teachers express reluctance to accept appointments as school principals or headteachers?
- What are the measures appropriate for assessing school and school authority readiness for sharing decision making?
- What protections do teachers require to safely challenge educational structures and to serve as a *loyal opposition* within educational systems?
- How might leadership facilitators facilitate school improvement?
- How can the dominant form of teacher and principal preparation move from an *apprenticeship of observation* to more structured and critically challenging forms of leadership development?
- How may admission decisions to teacher and principal preparation programs identify applicants' levels of altruism?
- Do intercultural educational experiences foster educators' cultural literacy, and do they promote deep and rich appreciation for difference?
- What is the impact of teacher and principal changes on collaboration in schools?
- What are the distinctions between teacher leaders serving as advocates or as activists?
- What influences do prominent and politically motivated community leaders have on governance of schools?
- Can technology be used to create international communities of practice that promote shared leadership?
- Are there teacher leaders whose influence in school communities is toxic? How should toxic leadership be addressed?
- Is a clearer definition of teacher leadership required or is it sufficient to view it as an essential element in school improvement processes?
- What are the most informative and accurate measures for determining the success of educational systems?
- How should decision making and school improvement initiatives differ in the context of elementary and secondary schools?

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