# Formative Leadership for Learning:

Leveraging Empirical Studies of Educational Leadership for Formative Tools

# by

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Leveraging Empirical Studies of Educational Leadership for Formative Tools Abstract

The Comprehensive Assessment of Leadership for Learning (CALL) is built on five domains of research-based leadership practices. We believe that with a preponderance of evidence about what effective leaders do, the next major research agenda should be the study and validation of formative development processes for school leaders. Formative guidance will meet leaders where they are and inform them about what tasks to engage in to improve student achievement based on the foundation of research already in place. CALL is an attempt to build such a tool. Using a measure of actual practice, tools used, and a collective teacher perception of leadership, CALL provides diagnostic information about local practice within five domains: 1) Maintaining a focus on learning, 2) Monitoring teaching and learning, 3) Building nested learning communities, 4) Acquiring and allocating resources, and 5) Maintaining safe and effective learning environments.

## Synthesis and Assessment for Leadership for Learning

Leadership has long been believed to be an important component of effective schools and a powerful influence on student achievement (Glasman, 1984; Leithwood, Begley, & Cousins, 1990; Leithwood & Montgomery, 1982; Silins, 1994). However there have been decades of debate about the effect of leadership in particular (Firestone & Herriott, 1982; Hallinger & Leithwood, 1994; Purkey & Smith, 1983; Rowan, Dwyer, & Bossert, 1982; van de Grift, 1990). Evidence in the 90's demonstrated that indeed leadership mattered, the effects were significant and educational leadership reached a "leap forward" (Hallinger, 1996) by shifting the conversation from 'if' to 'how' leaders influenced student achievement. Since then, research has mapped what leadership looks like, how it's enacted, and what specific tasks have measurable impact on student learning (Leithwood & Duke, 1999; Spillane, Halverson, & Diamond, 2001; Waters, Marzano, & McNulty, 2003).

Small-scale qualitative studies (Gezi, 1990; Spillane, et al., 2002), began to build a base for large scale quantitative work to validate frameworks for understanding leadership goals (Hallinger & Heck, 1999; Heller & Firestone, 1995; Sheppard, 1996) and standards of practice we should expect in expert leaders. These efforts focus primarily on summative assessment of leaders, rather than on guiding development of novice leaders into expert ones. For instance, according to both the ISLLC and VAL-ED measures, leadership should facilitate a 'vision' for learning, but provide limited information on how to build a collective vision.

## INSERT TABLE 1 ABOUT HERE

Building on this work, current research is producing a clearer picture of the 'how' of leadership. Evidence continues to become more and more specific about the core practices involved in leadership. Communities can now identify responsibilities (Waters

<sup>&</sup>lt;sup>1</sup> For instance the Interstate School Leaders Licensure Consortium Standards (ISLLC) outlined in (Van Meter & Murphy, 1997), the Institute for Learning Principles (L. B. Resnick & Hall, 1998), and the VAL-ED dimensions (Murphy, Elliott, Goldring, & Porter, 2006)

& Marzano, 2006) and macro and micro tasks (Spillane, Halverson, & Diamond, 2004a), and articulate practices that effective leaders carry out consistently for a positive effect on student learning (Leithwood, Seashore-Louis, Anderson, & Wahlstrom, 2010).

These studies have differed on vocabulary, but can be summarized in five domains rooted in empirical evidence. We used the IFL Principles of learning (Quint, Akey, Rappaport, & Willner, 2007), the ISLLC standards, in combination with recent meta-analysis of empirical work (Leithwood, 2010; Robinson, 2008) to clarify these five domains: 1) Maintaining a focus on learning, 2) Monitoring teaching and learning, 3) Building nested learning communities, 4) Acquiring and allocating resources, and 5) Maintaining a safe and effective learning environment<sup>2</sup>. Reviewing past synthesis of leadership literature and summative measurements show that alignment is possible and reveals the focus of past work – as having foci within the domains. As shown on the following chart, we believe we can capture the past work within these domains and use it as a grounding for a definition of what leadership tasks are.

#### **INSERT TABLE 2 ABOUT HERE**

However, simply sharing what leadership is to practitioners doesn't necessarily translate into transformed *practice*. Significant research about leadership has begun to reveal how complex this growth process is for leaders – leadership is intermediary, social, contingent, embodied and ultimately distributed. Leadership has an indirect effect on learning (Heck, Larson, & Marcoulides, 1990) that is mediated (Wertsch, 1991b) through a direct impact on teacher and staff development, work environment, and creating a safe environment for student learning (Hallinger, Bickman, & Davis, 1996; Leithwood, Begley, & Cousins, 1994; Leitner, 1994; Ross & Gray, 2006). This intermediation challenges leadership studies, but confirms the role of the leaders as studies continue to account for influence using a mediated framework (Waters & Marzano, 2006).

<sup>&</sup>lt;sup>2</sup> These domains are strongly influence by the idea of distributed leadership and these are the "Macro" tasks explained by Spillane and colleagues (2004). The same domains are found in the Halverson Rubrics developed as part his work with the Pittsburgh schools.

Social enactment perspectives recognize another key to understanding formative leadership. Not only does the community have general influence on leadership (Cuban, 1988), their expertise (Bacharach & Lawler, 1980), and their resistance (Blase & Blase, 1999) will impact the growth and effectiveness of their leadership. Leadership only occurs within a community and must be studied in that community (Brown & Duguid, 1991; Lambert, et al., 1995) in order to provide key formative feedback (Smylie & Hart, 1999; Spillane, et al., 2002).

It follows that leadership is contingent on structures, people, cultures, and artifacts within the environment where it takes place. What works for one leader may not work for the next. Leadership learning is contingent on surrounding technologies, the environment. and nature of work being done (Lave & Wenger, 1991; Resnick, 1991; Wertsch, 1998), or more specifically, attributes of the school such as the age of the staff (Dwyer, Lee, Rowan, & Bossert, 1983), instructional technology involved (Cohen & Miller, 1980), the potential effect of leadership efforts (Bossert, Dwyer, Rowan, & Lee, 1982), and the size and complexity of the organization (Scott, 1995). This makes one model for all leadership learning essentially challenging. Moreover, whatever formative model is created *must* capture key elements of the context and contingencies of leadership before framing formative feedback.

Early in the 1980's, leadership artifacts emerged as one potential way to capture practice (Leont'ev, 1981) as meditational tools (Wertsch, 1991a), artifacts of thought (Perkins, 1993), and tools that have embodied knowledge (Hutchins, 1994). Artifacts not only structure practice, and have embodied knowledge, their *design* gives rare glimpses into how leaders organize and structure their thinking about leadership. Formative assessment can track and capture some of these artifacts and their use in schools to accurately build an understanding of the development of the leader and their thinking about leadership.

Finally, leadership cannot simply be looked at as the action of a single person within a system. Leadership *tasks* can be distributed formally and informally throughout an organization (Heller & Firestone, 1995; Newmann, Secada, & Wehlage, 1995). This leadership is constituted by practice regardless of who carries it out (Pea, 1993; Spillane, Halverson, & Diamond, 2004b). Framing leadership into domains of practice, we keep in mind a distributed perspective of leadership. This means a formative tool needs to also be distributed to members of the community in order to see exactly where and how leadership tasks are carried out (or not) in practice. What tasks are essential, how are they enacted, by whom, and to what effect? We start this exploration with a look at the intermediary, social, contingent, embodied, and distributed task of maintaining a focus on learning.

# Domain 1: Maintaining a Focus on Learning

Today, scholars make the claim that 'focus' is clearly important for the work of leadership (Hallinger, 2003; Kelley & Shaw, 2009; Leithwood, Seashore-Louis, Anderson, & Wahlstrom, 2004) The ISLLC standards judge leaders by the degree to which they are "facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community" (CCSSO, 1996). Both of which beg, 'What expectations?' and 'Where should leaders focus?' Leaders stand to waste energy on the wrong focus (R.F. Elmore, 1996). Specifically, a leader focused on the bureaucracy of schools could have achieved a clear 'vision' for running attendance at the school, but not have any impact on student learning (R.F. Elmore, 2000; Tyack & Cuban, 1995).

## A 'Focus' on Learning

Over the last fifteen years, leadership studies have reaffirmed that a leader indirectly impacts student achievement in significant ways (Leithwood & Jantzi, 2008). Research claims that a leader must compose a 'moral vision' (Bolman & Deal, 1992; Fullan, 1993, 2003; Hallinger, 1996; Sergiovanni, 2006) that has an essentially 'consistent voice' (Anderson, 2006; Campbell & Fullan, 2006; Cawelti & Protheroe, 2001; Hightower, Knapp, Marsh, & McLaughlin, 2002), is best enacted in longevity (Waters & Marzano, 2006), in community (Garibaldi, 1993; Leithwood, 1992), and is accepted by the community (Hallinger & Heck, 1996; Leithwood & Jantzi, 1999a), as a focus for building learning outcomes/goals in the school (Deal & Peterson, 1990; Leithwood, 1994; Purkey & Smith, 1983; Waters & Marzano, 2006). Leaders should use their learning focus as a framework for decision making at all levels in the organization (Hallinger & Heck, 2002). Finally, since 1998 the Institute for Learning has demonstrated the need for a focus to have "clear expectations" (Quint, et al., 2007).

# Use of Data

Clarifying a focus on learning can be informed by studies that look at specific practices in relation to student achievement. We outline two examples: the 'Use of data' as a focus on learning and 'Decision making' as a focus on learning. Data serves leaders in specific ways. The use of data is *evidence* of effective leadership, but also developmental for a leader seeking to improve practice (Hallinger & Heck, 2002). The practice of data use comes with specific competencies that can be observed. For instance, leaders can use data to establish a target problem (R. Halverson, Kelley, & Kimball, 2004), set goals (Hallinger & Heck, 2002), determine value-added results, evaluate practice, and application (Kelley & Shaw, 2009). Data should be collected from multiple sources (Brewer & Hunter, 1989; Yin, 1984), so leaders should not only understand why, but how, and carry out practice accordingly (Knapp, Copland, & Swinnerton, 2007). It is important for leaders to be intentional about who uses data (Earl & Katz, 2002; Wayman, Midgley, & Springfield, 2006) when data gets used (Erickson, 2007), and how it gets used (Leithwood & Louis, 2010). Leaders can report 'use of data', but data can be more or less effective depending on the intention of use – summative vs. formative (Black & Wiliam, 2004). It is not enough to say "Principals should use data", a formative instrument for leadership development needs to capture nuances of the use and application of data to measure the quality of the leader and provide any valuable information about what needs to be done.

#### Making Decisions

Another defining factor for a focus on learning is 'decision making'. Again, it is not enough to simply measure if a leader makes decisions, or tell leadership that making decisions is important for effective practice. For CALL, a focus on learning means that decisions were directed accordingly in specific manifestations that are rooted in research. There is quality work that provides frameworks for decision-making in educational leadership (Bolman & Deal, 1992; Hallinger & Heck, 2002; Kelley & Shaw, 2009). Decision-making is clearly agreed on as an element of effective leadership (Hallinger, Leithwood, & Murphy, 1993; R. Halverson, et al., 2004; R. Halverson & Thomas, 2007; Leithwood & Steinback, 1995).

There are qualifiers to effective leadership. Waters & Marzano (2006) were surprised to find that effective leaders needed a 'defined autonomy' in order to make those decisions – something that should be clearly observable. A single leader doesn't

necessarily make decisions alone, but across distributed practice (MacBeath, 2005; Spillane, 2005; Spillane & Diamond, 2007), as long as decisions are made and made effectively, results will follow. Effective decision-making also acts as a community building function in schools (Hallinger & Heck, 2002; R. Halverson & Thomas, 2007; Leithwood, Jantzi, et al., 2004; Leithwood, et al., 2010), and touches on multiple elements of building a focus on learning (Leithwood & Jantzi, 2008). It is not enough simply telling leadership to, "Make decisions well", but to outline what that looks like in practice. Decision making has a long history of tools, methods, and collaborative practice that informs it and we want the CALL instrument to embody and reflect the empirical work done in a way that is useful to inform all levels of leadership for formative growth. This means that it is as important to capture and measure expert practice as it is to capture and measure developing practice.

## Summarizing Focus on Instruction in the body of research

Often the *practice* of leadership sounds much like the *standards* of leadership – showing a concurrence between what was believed to be good practice and the recent generation where it's being empirically verified as good practice. This also can present a pitfall of confusion in terms of language used. We loosely tried to capture the behavior and intent of the language used, in order to define a focus on learning. Domain 1: Focus on Learning uses this decade of work as a foundation, then validated the specific behaviors though validation studies over the last year (Condon, Clifford, & Milanowski, in progress).

Waters, Marzano, & McNulty (2003) reviewed 30 years of research and identified 21 Leadership Responsibilities related to student learning. They call leaders to "foster a shared belief", a "sense of community", "cooperation", to establish a focus on "clear goals", and "keep those goals in the forefront of the school's attention". These leave leaders with the same open ended question about what practices lead to these "clear goals", however the work is a step forward in that this marked a new era in validating claims about leadership against student achievement. More efforts were to follow.

Meta studies of recent research all conclude that a focus on learning is essential – though they differ on specific vocabulary. Spillane, Halverson, & Diamond (2004a) call

for leaders to, "construct and sell a vision". Leithwood et al. (2004) calls uses "Setting Directions" as the first of three key practices further clarified by the identification and articulation of 'vision', fostering group goals, and establishing high expectations. The popular VAL-ED defines a "Vision for Learning" (Murphy, et al., 2006). Finally, Robinson, Lloyd & Rowe (2008) link leadership to learning by "establishing goals and expectations".

Following these meta-studies, the foundational scholarship on focus, and the author's own case-work (E. R. Halverson, 2005), we construct a list of discrete observable actions or conditions that would necessarily be present to varying degrees. For instance, if leadership has successfully built a focus on learning in a school, it would follow that the staff would agree that their school has a 'school-wide focus on learning' because they are necessarily the targets of the practice. The converse is also true, if there is disagreement about a focus on learning, than leadership has work to do in this area. Another example of this transition from the literature includes that if 'instructional leadership' is a desired state, than we should be able to measure this to the degree that followers recognize their leaders as such (M. Smylie & Hart, 1999).

We break these practices down into four component tasks. Confirmation for each is found in the literature and confirmed in literature reviews. Correlating observable conditions rooted in the collective evidence of practice for the first domain: Maintaining a focus on learning.

# Domain 1: Maintaining a Focus on Learning

Maintaining a school-wide focus on learning:

- Leaders regularly engage the school community and staff in ongoing conversations that serve as a foundation of a collective understanding of student learning (E. Goldring & Pasternak, 1994; Waters & Marzano, 2006).
- School presence of a collaboratively developed, and regularly revisited, vision of learning that reflects actual practices and aspirations of teachers (Hallinger. 2003; Leithwood, Jantzi, et al., 2004).
- Leaders regularly discuss both student achievement data or concrete examples of instructional practice with teachers (R. Halverson, et al., 2004; Kelley & Shaw, 2009).

Formal leaders are recognized as instructional leaders:

School staff and all stakeholders recognize the principal as an instructional leader in the school and consistently seek him/her input on a variety of instructional issues (Hallinger, 2005; Hallinger & Heck, 2002).

- School leaders regularly engage in public instructional leadership activities such as learning walks or classroom visits (Abrutyn, 2006; Biddle & Saha, 2006).
- School leaders work with teachers to organize professional development and curriculum design, and are active participants in the sessions (E. B. Goldring & Rallis, 1993; Pearce & Conger, 2003).

## Collaborative design of an integrated learning plan:

- Strategies to improve student academic performance are the regular focus of faculty meetings (Scribner, Sawyer, Watson, & Myers, 2007).
- The school has a collective instructional planning process that uses student multiple sources of data to coordinate specific instructional initiatives toward overall goals of student achievement (Knapp, Copland, & Talbert, 2003; Leithwood, et al., 2010; Yang, Goldstein, Rath, & Hill, 1999).
- The schools learning plan integrates intermittent measures of student progress toward learning goals (R. Halverson, 2010).

# Providing appropriate services for students who traditionally struggle:

- Special needs staff work together and with teachers to plan services (Frattura & Capper, 2007).
- Services are usually provided in the context of the regular classroom (Vaughn & Linan-Thompson, 2003).
- Leaders work with teachers to develop and monitor differentiated instructional practices for students who traditionally struggle (Fuchs, Mock, Morgan, & Young, 2003; Lawrence-Brown, 2004).
- Teachers consistently use pre-assessment tools as a basis for differentiation in all content areas (Hoover & Patton, 2008).
- Differentiation of instruction is regularly observed across subject areas (Hall, 2007; Tomlinson & McTighe, 2006).

# **Domain 2: Monitoring Teaching and Learning**

The domain of monitoring teaching and learning consistently is highlighted as core to effective leadership practice. In the 90's this meant "encouraging staff" (Heller & Firestone, 1995), "supporting teacher development" (Sheppard, 1996), and providing "fair and credible evaluations" (Quint, et al., 2007). Today we see both qualitative and quantitative evidence that leaders should be involved in monitoring teaching and learning even if this is often problematic for many (Hammerness, Darling-Hammond, & Bransford, 2005; Nelson & Sassi, 2005). Here we review current work has given us a more compelling picture of the importance of leaders as instructional leader for both teacher development and student learning.

Current work summarizes that leadership involvement in teacher training has impact on student learning (Heller & Firestone, 1995; Leithwood, et al., 2010). Principals have a responsibility in this area (Hallinger, 2003; Waters, et al., 2003) to develop staff and monitor the instruction in the school. This focus on teaching and learning has, albeit indirectly, an influence on the learning in the school (Wahlstrom & Louis, 2008). Leaders should be directly involved in monitoring teaching (High & Achilles, 1986; Marzano, Waters, & MucNulty, 2005) and learning (Clark, Lotto, & McCarthy, 1980)

Often this is called 'Instructional Leadership' (Goddard, 2002; Joyce, Calhoun, & Hopkins, 2002; Sergiovanni, 2005), but it also captures elements of 'Transformational Leadership' (Yukl, 1981). This includes what is synthesized as a call for "academic rigor in a thinking curriculum" (Quint, et al., 2007), "monitoring instruction and innovation" (Spillane, et al., 2004a), "Planning, coordinating, and evaluating teaching and the curriculum" (Robinson, et al., 2008) and creating "powerful, equitable learning opportunities" (Knapp, et al., 2003). Finally, monitoring teaching and learning captures leadership influence on the "curriculum program", "assessment program", and "instruction program" outlined by the VAL-ED tool (Murphy, et al., 2006). Monitoring teaching and learning includes the oversight, design, and implementation of both summative and formative development of teachers and their students.

Monitoring Student Learning

Leaders first protect the key times when teachers and students work together. Murphy, et al. (2006) call this the "cauldron in which student achievement materializes." Though saying learning happens when instruction happens is fairly obvious, it's important to note research that confirms it (Denham & Leiberman, 1980; Roueche & Baker, 1986). In the 90's, expectations of leadership and more detail has provided clarity on specific leadership tools leaders can use to influence learning outcomes like structured opportunities for grade or subject area meetings (Fisher & Adler, 1999; Gezi, 1990; Wenglinsky, 2002), time for the redesign of instructional strategies based on formative data (Black & Wiliam, 2004; Hallinger & Heck, 1996; Wenglinsky, 2004), time for building in checkpoints for just-in-time monitoring of student learning and adjustment of instruction (Erickson, 2007), and simple praise and encouragement for learning (Wynne, 1980).

Research shows that summative evaluation of student learning is more than a score. Effective leaders use multiple sources of data from such evaluations to further improve goals (Hallinger & Heck, 2002; Knapp, et al., 2003), establish target areas of improvement (R. Halverson, et al., 2004; Marzano, et al., 2005), and thus act as core artifacts for developing collective leadership (Leithwood & Jantzi, 2005). Building mechanisms, centered on summative data, drives institutional change and is central to instructional leadership for student learning (Hallinger & Heck, 1998; Heller & Firestone, 1995; Wenglinsky, 2002). Moreover these can be measured by whether or not school leaders have provided time to process the data (M. A. Smylie & Wenzel, 2003; Spillane, 1998).

# Monitoring Teaching

Effective leaders spend formative time investing in teacher instructional capacities (High & Achilles, 1986; Marzano, et al., 2005). Teachers are the link between principals and student learning and a focus on teacher instruction is indirectly the link to student achievement (Wahlstrom & Louis, 2008). Though difficult to find time for monitoring instruction over the day-to-day challenges, effective leadership does find the time (Clark, et al., 1980; Conley, 1991; R. Halverson, et al., 2004; Leithwood & Jantzi, 1990; Ouint, et al., 2007).

Effective leaders have a knowledge of curriculum and instructional best practices (Waters & Marzano, 2006), including content knowledge (Nelson & Sassi, 2005), but more importantly strategies for effective instructional skills (Cawelti, 1997). Delivery involves skills that include the ability to provide intellectual stimulation for adult learners (Cawelti, 1997; Leithwood, et al., 2010; Waters, et al., 2003) and the perception of availability to teaching staff for informal guidance (Marzano, et al., 2005).

Summative performance evaluations are more than a duty to effective leaders, they are an opportunity to provide feedback that improves the instructional process. They should be consistent and regular (Clark, et al., 1980), employ a collection of strategies for supervising and evaluating instructional practice (Blase & Blase, 1999), address collective and individual support for effective practice(Hallinger & Heck, 1998), and result in teacher motivation to improve instructional practice (MDRC, 2007), defined by an improvement in student learning (Leithwood & Montgomery, 1982; Wahlstrom & Louis, 2008). Finally, evidence points to a broader role for school leaders in creating collaborative opportunities to improve instruction (Leithwood, et al., 2010).

We break these practices down into four component tasks. Confirmation for each is found in the literature and confirmed in literature reviews. Correlating observable conditions rooted in the collective evidence of practice for the second domain:

Monitoring teaching and learning.

## Domain 2: Monitoring Teaching and Learning

Formative evaluation of student learning:

- Leaders provide structured opportunities at grade level or subject matter meetings for teachers to share practices for providing meaningful, systematic feedback on student performance (Fisher & Adler. 1999; Wenglinsky, 2002).
- Leaders recognize the value of formative assessments and provide opportunities for teachers to collaboratively redesign assessments in light of school learning goals (Black & Wiliam, 2004; Hallinger & Heck, 1996).
- The school successfully uses a systematic method for providing intermittent measures of student learning in order to predict and shape student-learning outcomes across classrooms and grade levels (Erickson, 2007).

#### Summative evaluation of student learning:

• Evaluations of student performance are based on multiple sources of data including student self-evaluation and/or self-reflection (Knapp, et al., 2003).

Teachers and staff have multiple annual opportunities to collaboratively reflect on achievement data and redesign the school instructional program in light of the data (M. A. Smylie & Wenzel, 2003).

#### Formative evaluation of teaching:

- Principals invest weekly time for both formative and summative purposes and regularly provide feedback on teaching (High & Achilles, 1986; Marzano, et al., 2005).
- Leaders provide guidance for individual teachers to find resources to improve practice that are integrated into teacher and school improvement planning (Nelson & Sassi, 2005; Wahlstrom & Louis, 2008).
- Faculty meetings include samples of typical and exemplary student performance. more than quarterly, to clarify teaching and learning tasks and distinguish levels of performance (Cawelti, 1997; Waters, et al., 2003).

## Summative evaluation of teaching:

- Evaluation policies are developed for teachers and staff and reviewed annually (Clark, et al., 1980; Marzano, et al., 2005).
- Occasions for evaluation are targeted to measure the staff's ability to engage in the school's major instructional initiatives (Hallinger & Heck, 1998).
- The evaluation process draws on multiple classroom visits by multiple observers (Blase & Blase, 1999).
- Evaluation practices are used to document poor teaching as well as to provide valuable feedback for accomplished teachers (MDRC, 2007; Quint, et al., 2007).
- The design of the evaluation process integrates measures of student learning and is linked with the school and teacher's professional development plan (Leithwood & Montgomery, 1982; Wahlstrom & Louis, 2008).

## **Domain 3: Building Nested Learning Communities**

"Nested learning communities", as defined by Resnick and Glennan (2002) are "organizations in which all individuals and units are expected to upgrade their capacities continuously in accord with a shared set of instructional principals and strategies." Communities first must focus on learning, and then be about the work of improving instructional practice through collective learning, leadership, and coaching and mentoring for better instruction. Recent work summarizes that "collective leadership has a stronger influence on student achievement than individual leadership" (Leithwood, et al., 2010). It is clear that leadership that builds nested learning communities is leadership that builds the vehicle for higher student achievement.

Though earlier attempts broadly paint "influencing context" (Van Meter & Murphy, 1997), current research has placed this leadership task among the key practices of leaders in virtually all of the reviews available. Today's revision of the ISLLC standards (Condon & Clifford, 2009), (first outlined a decade prior (Van Meter & Murphy, 1997)), have sweeping practices like "developing a school culture", and "collaborating with faculty and community members". The IFL standards use much more specific language and definitions of, "Accountable talk <sup>©</sup>, Socializing intelligence, Selfmanagement of learning, and Learning as apprenticeship"(L. B. Resnick & Hall, 1998) along with processes for enactment. "Developing People" is one of the 3 practices of Leithwood and colleagues (2004) and they break it down more into: "Providing support, offering intellectual stimulation, providing models of best practice, and building collaborative processes." All of which is being built on a clear thread of research.

The act of "promoting and participating in teacher learning and development" (Robinson, et al., 2008) leans heavily on recent work that establishes leadership as a variable for student achievement (Scribner, et al., 2007). Leaders can make a difference. Their influence on student achievement is indirect, yet a statistically significant factor (Scribner, et al., 2007; Waters & Marzano, 2006). Their direct influence is on the teachers and redesigning the organization around their learning, growth, and development. Leaders are the central character in building nested communities through their actions (Bryk, Camburn, & Louis, 1999; Louis & Marks, 1998; Marks, Louis, & Printy, 2002).

## Leadership Structures

Leaders have a direct impact on the systems of leadership they create. Research shows that the process of 'sharing' leadership functions is effective, but the vocabulary varies; some simply call this 'shared leadership' (Pearce & Conger, 2003), or 'teacher leadership' (York-Barr & Duke, 2004). The theory and process of sharing these tasks and the study of it is outlined in the work on 'distributed leadership' (Spillane & Diamond, 2007; Spillane, et al., 2004a) as a research agenda. The practice of leadership is allocated to multiple people within the community and the ties between leaders, followers, and the tools they use are key to the change process. These structures ultimately provide a community with a greater vested interest in the problem solving or 'transformations' (Leithwood & Jantzi, 1999a) that the organization seeks. Instead of following a charismatic leader, organizations can adapt to change more effectively when they are responsible for leadership and learning collectively and over time (Collins, 2001; Waters, et al., 2003). Nested communities have a long-range view of improving practice and each program builds on the results of the last, gaining momentum over time – what Collins calls the "flywheel effect" (2001).

Sharing leadership as a discrete practice on the part of effective leaders leads to clear outcomes. Professional community can serve as a vehicle for emergent teacher leadership roles and a breeding ground for future leaders (Ross & Gray, 2006) or at the least building a sense of efficacy (Goddard, 2002). When developed in community, professional development programs can become more relevant, effective, and ultimately have a greater impact on student achievement (E. B. Goldring & Rallis, 1993).

## *Teacher-to-Teacher Relationships*

Specifically, teacher-to-teacher relationships act as the "foundation for the way in which teachers work to improve instruction," (Louis, 2006). Ultimately, in building nested learning communities, the 'nest' is built within safe, collaborative, formative groups of teachers working toward effective instruction (King & Newmann, 2001; Louis & Marks, 1998; M. A. Smylie & Wenzel, 2003) working with internal motivation from persuasive versus directive leadership (Desimone, Smith, & Phillips, 2007). When teachers are given time, incentive, and responsibility it follows that there is an implicit

(and possibly explicit) accountability for using those resources toward professional growth (R. F. Elmore, 2004), self-initiated problem-setting and problem-solving because teachers identify themselves *as* the problem-solvers (Wenger, 1998).

#### Mentoring

As teachers are able to support each other in this problem-solving process, formal and informal programs for mentorship can have valuable impact on student learning (Hobson, Ashby, Malderez, & Tomlinson, 2008). Mentorship studies mostly track new teacher development and the benefits of instructional skill development, classroom management skills, and capacity for managing the workload of schools, (Lindgren, 2005; Malderez, Hobson, Tracey, & Kerr, 2007; Moor, et al., 2005), making mentoring programs a key leadership target (Carter & Francis, 2001; Franke & Dahlgren, 1996; Marable & Raimondi, 2007).

In addition, studies looking at mentoring programs are also suggesting the incidental benefit to the mentors (Hagger & McIntyre, 2006). Mentors bring their expertise to bear on new teachers, but also have an opportunity to reflect on their own practice (Lopez-Real & Kwan, 2005), learn from 'new' practices and ideas (Hagger & McIntyre, 2006), improve communication skills (Moor, et al., 2005), and interestingly a stronger sense of community, cooperation, and tolerance for teachers with different ability levels (Hagger & McIntyre, 2006; Lopez-Real & Kwan, 2005; Simpson, Hastings, & Hill, 2007). Finally, mentorship is an extension of responsibility that provides foundational experiences to those that may pursue leadership roles in the organization later (Moor, et al., 2005).

Some reports outline drawbacks to mentorship programs however and the leadership responsibility is to make sure that efforts are directed in a way that maximizes the positive elements (Abell, Dillon, Hopkins, McInerney, & O'Brien, 1995; Simpson, et al., 2007). When done well, mentorship can be a key force of improving instruction, when done poorly it can be, at best, a waste of time. This means it's not enough for CALL to simply ask if they have mentor programs, but to qualify the program (if present) based on the research. Leaders must ensure sufficient support, time, and training to mentors (Smith & Maclay, 2007), work to ensure a formative program to allow for

innovative practice (Malderez, et al., 2007), and work toward incentive and recognition of quality mentorship and growth (Abell, et al., 1995; Simpson, et al., 2007).

The choice of mentors is the final determinant of programs that build great mentorship. Mentors should be models of professional practice (R. Foster, 1999; Roehrig, Bohn, Turner, & Pressley, 2008) and recognized as such by the mentees and larger community (Abell, et al., 1995). Mentors need to be vested and willing to do the job and concerned for the development of the mentee (Abell, et al., 1995; Hobson, et al., 2008) and preferably teach the same content as the mentee (Hobson, et al., 2008) – all of which requires leadership to manage, choose, maintain, and develop a common discourse around practice and pedagogy (Carroll, 2005).

# Domain 3: Building Nested Learning Communities

Collaborative school-wide focus on problems of teaching and learning

- The school has collaboratively developed a long-term vision for instructional improvement (Waters & Marzano, 2006).
- Current programs and teacher planning builds on past initiatives (Collins, 2001; Marzano, et al., 2005).
- Professional development, curriculum design and school improvement planning are linked to the key problems of teaching and learning (Louis, 2006).
- Meetings at which school instructional initiatives are discussed are mainly participatory (E. B. Goldring & Rallis, 1993; Marks, et al., 2002).
- Faculty committees develop intermediate timelines and benchmarks to determine whether new practices are helping achieve student-learning goals (Wayman, et al., 2006).

#### Professional learning

- The school has developed a long-term plan for focused support of professional growth in key instructional areas that provide differentiated support for individual teacher ability in terms of whole school instructional goals (Marks, et al., 2002; Wahlstrom & Louis, 2008).
- Information is disseminated in alternative media to allow for maximum time for staff to engage in and reflect upon professional development activities.
- A variety of summative and formative feedback assessments are developed to determine whether the professional development program helps teachers improve student learning in targeted areas (Malderez, et al., 2007; Spillane, et al., 2002; Waters & Marzano, 2006).

#### Socially Distributed Leadership

Leaders create structures through which teachers and staff are able to develop initiatives for the school's instructional priorities (Leithwood, et al., 2010).

- Leaders develop structures to solicit staff and teacher feedback about the overall goals as well as the details of the school budget plan (Pearce & Conger, 2003; Spillane, et al., 2002).
- Control over the direction and content of the instructional agenda is shared by leaders, teachers and staff (Leithwood & Jantzi, 1999b; York-Barr & Duke, 2004).

## Coaching and mentoring

- Leaders provide teachers who have expertise in content and pedagogy with structured opportunities to share information, experiences and/or knowledge with other teachers (Roehrig, et al., 2008).
- Expert teachers are selected to mentor other teachers on a regular basis, and mentoring training programs help mentors relate their experiences to mentees (Smith & Maclay, 2007).
- District-level instructional coaches are respected instructional leaders and are known for helping teachers solve problems and introducing new methods and practices (Abell, et al., 1995).

#### **Domain 4: Acquiring and Allocating Resources**

Leadership practices that surround acquiring and allocating resources have been a mainstay in the literature. The fourth domain of CALL includes acquiring and allocating resources because evidence has given further justification for the need for specific practices for leaders. Leaders are in the unique position to determine how resources will be used to improve teaching and learning. Of course how these choices are made can be distributed (Spillane, et al., 2001) too across people in the organization in the areas of personnel, time, budget, and external resources and families.

Resource management has taken different names in the literature that summarizes leadership practice. ISLLC standards include the leader's ability to collaborate with the community and respond by mobilizing resources and the broad qualifier of, "Understanding, responding, and influencing contexts," (Van Meter & Murphy, 1997), — where IFL principles simply call for "Organizing for effort" (Quint, et al., 2007). Current summaries of the research use more specific practices like, "Modify organizational structures" (Leithwood, Jantzi, et al., 2004). Leadership essentially is responsible to "Procure and distribute resources..." (Spillane, et al., 2004a), "Resource acquisition and use" (Murphy, et al., 2006), or "Resourcing strategically" (Robinson, et al., 2008). All of these descriptions point to a core domain of practice to be attentive to getting and using resources because of a growing base of empirical work that reinforces their importance (Waters, et al., 2003) as an indirect influence on student achievement (Leithwood, et al., 2010).

Earlier work has come far in a theoretical identification of resources in a broader sense (Bennis & Nanus, 1985; Burns, 1978) and their application beyond simple management, into leadership (Cuban, 1988). Leaders understand the range of resources, how to acquire them, allocate their use for student learning, and coordinate transformational efforts via resource management (Leithwood, 1994). Specifically, resource leadership includes the social, material, and cultural facets of people, time, budget, and internal and external stakeholders.

Personnel, Time, & Budget

The level of qualification a teacher holds matters to build better student achievement. Darling-Hammond, Berry, and Thoreson (2001) summarize the empirical support for finding and keeping trained teachers and staff. This practice has direct impact on student outcomes and goes back decades in the literature (Druva & Anderson, 1983). Once selected, leaders need to attend to mentoring and continuing building their personnel with induction, mentoring, teaming (Flowers, Mertens, & Mulhall, 1999), and development programming (Abell, et al., 1995; Hobson, et al., 2008), perhaps even building incentives for teachers to help one another master teaching practices (Darling-Hammond, 2009).

Any of these programs require building schedules that allow professionals time to search for, attract and develop high quality practitioners. A common planning time is a struggle, but evidence repeatedly shows it's worth for leaders to invest in for the development of teacher practices (Felner, et al., 1997) and for higher levels of student achievement (Flowers, et al., 1999; Mertens & Flowers, 2003, 2006; Warren & Muth, 1995).

A leader's sense of efficacy in regard to the allocation of resource is rooted both in the realities of their agency and in their perception of discretion available (Leithwood, et al., 2010). Leaders need to have and feel the ability to realign resources on school-wide goals for student learning (R. Halverson & Thomas, 2007). Fiscal and performance data should be used to set goals, predict and measure outcomes, and guide decisions for value-added results (E. Goldring & Pasternak, 1994; Hallinger, et al., 1993; R. Halverson, et al., 2004; Leithwood, et al., 2010). Budgets should be part of a transparent, reviewed, community decision-making process to access the expertise of the community for key decisions that effect student learning (Spillane, et al., 2001; York-Barr & Duke, 2004).

## External expertise and community relations

Leaders can specifically address the school's use of external assets. External experts should align with school learning goals as part of a focus on learning and to align a consistent voice on school initiatives for learning (Campbell & Fullan, 2006; Cawelti & Protheroe, 2001), but also to provide impartial perspectives that may challenge internal interpretations of data and problem-shaping (R. Halverson & Thomas, 2007). The quality

of the external resources provides an authority for use, (Desimone, et al., 2007). Effective leaders connect to the effective and powerful external resources already laying in wait in their communities (Allensworth, Bryk, & Sebring, 2010; Berg, Melaville, & Blank, 2066).

Families are a key external resource for leaders to build a relationship with. Parental involvement with learning initiatives have a positive correlation with student learning (Fan, 2001), and principal efforts to involve them in school and community programming also indirectly influences student outcomes (Epstein & Dauber, 1991). For the school to build these relationship, there needs to be an awareness of community 'learning' about the school and their role for involvement. Relationship building requires leaders to continually ask what community members want to know about the school at 'proximal' (Erickson, 2007) times for learning.

## Domain 4: Acquiring and Allocating Resources

#### Personnel practices

- Teachers are certified and/or meet requirements to teach in their assignments (Darling-Hammond, et al., 2001).
- Teachers with specialized qualifications are actively recruited to fill needs (Darling-Hammond, et al., 2001).
- Teacher induction programs are integrated into mentoring and professional development programs.
- Leaders have developed an incentive system to reward teachers for progress toward school-wide goals.

#### Structuring and maintaining time

- Leaders structure professional time to address complex issues of instruction.
- Time is provided for whole-school, grade and subject matter level planning, curriculum design and reflection (Mertens & Flowers, 2006; Warren & Muth, 1995).
- Teachers receive feedback on effective uses of instructional planning time.

#### School resources are focused on student learning (Odden, et al., 2007)

- Leaders perceive they have considerable range of discretion for allocating and acquiring necessary human, material and financial resources (R. Halverson & Thomas, 2007).
- Leaders base budget decisions on school-wide goals for student learning (E. Goldring & Pasternak, 1994).
- Fiscal and performance data are systematically reviewed for making informed decisions (Hallinger, et al., 1993).
- There is a budget process that incorporates staff input and is transparent to stakeholders (Pearce & Conger, 2003).
- Staff receives training to participate in the budget process.

Integrating external expertise into school instructional program

- Leaders continuously seek out expertise from the district and outside resources.
- The work of external experts is coordinated and targeted to school instructional goals (Cawelti & Protheroe, 2001).
- The school has cultivated "critical friends" to provide perspective on school progress (R. Halverson & Thomas, 2007).
- Leaders have strong relations with the district and are able to influence the design of district priorities (R. Halverson & Thomas, 2007).
- Most teachers participate in professional networks outside the school (Desimone, et al., 2007).

Coordinating and supervising relations with families and the external communities

- Teachers contact many families per month to discuss academic progress, strategies for improvement, or to commend students' successes (Fan, 2001).
- Families work with leaders to develop programs that make the school more welcoming and bring community resources into the school (Epstein & Dauber, 1991).
- The school regularly sends information through a variety of media.
- The school seeks out what community members want to know about the school (Erickson, 2007).

## Domain 5: Maintaining a Safe and Effective Learning Environment

All comprehensive leadership frameworks include one or more claims that the environment itself must be orderly, safe, and free from disruptions. Some work assumes that the school is already safe and effective (probably because of a heavier focus on teacher practice as affected by principals; see (Quint, et al., 2007)), and that principals should only focus on 'setting directions, developing people, and redesigning the organization' (Leithwood, Seashore-Louis, et al., 2004). However, a safe and effective learning environment is foundational. In some schools, where discipline is broken down, learning isn't happening because order and safety are in question (Maslow, 1943).

Leaders have a responsibility to maintain 'order' and 'discipline' because it has a central impact on student learning (Waters, et al., 2003). For this reason, two of Spillane, et al.'s (2004) six 'macro-tasks' include "Establish a school climate in which disciplinary issues do not dominate instructional issues" and the broader "Manage school culture..." which needs to be, in part, a culture of safety so students can focus on their work. This theme appears again and again in research because it is a 'first function' of school leadership effective schools are proactive to build safe and effective learning environments.

However schools can be in danger of allowing discipline issues to dominate their measure of effectiveness. Once a school is generally orderly and predominantly functional for learning – principals should shift focus to learning environments and even begin to developmentally shift their understanding of 'safe and effective' to be one that protects learning environments from interruption, and as Robinson and colleagues put it, "Ensuring an orderly and *supportive learning environment*" (2008). It is not enough to be safe; leaders push this measure into positive practices with clear tasks that they undertake each day.

## Maintaining Safety

For most schools, the day-to-day tasks of the leaders does include oversight, management, and monitoring of entries, hallways, and leaders perceive themselves as 'buffers' for the classroom as a learning space. Once there is a culture of learning in place, simple "visibility" serves most leaders and has a positive correlation with student

learning (Waters, et al., 2003). We see a general trend that intervention programs are often well accepted (e.g. (Sprague, et al., 2001), and measure rates of student expulsion, behavior, and truancy for 'success'. Instead of looking at academic success, conversely these studies often look at academic failure (McEvoy & Welker, 2000). Current work is confirming that effective leadership in safe schools isn't about *avoiding* the negative; it's far more concerned with *encouraging* the positive - high academic achievement and participate *are* the more accurate measures of safe schools (Christle, Nelson, & Jolivette, 2004; Noguera, 2003; Raffaele Mendez, Knoff, & Ferron, 2002). For instance Christle and colleagues (2007) studies 196 schools and found that leaders should apply themselves to positive tasks reduce negative drop-out rates schools:

"Although schools and school personnel cannot change the individual, family, and community factors that may put youth at risk for dropping out of school, they can provide protective factors that may reduce these risks by providing a positive and safe learning environment; by setting high, yet achievable academic and social expectations; and by consistently facilitating academic and social success, and thus keeping students in school." (Christle, et al., 2007)

To maintain safe environments, principals have a growing body of research that is specifically nailing down tasks and strategies that are positive, proactive, and effective. Managing disruptive behaviors requires a 'fair and equitable' approach (Sheldon & Epstein, 2002), consistently enforced *and* encouraged (Gottfredson, 2001; Reinke & Herman, 2002), effective classroom management (Doyle, 2006; M. Foster, 2004; Horner, et al., 2009), school-wide (Horner, et al., 2009), climate building (Boykin, 2000; Sheldon & Epstein, 2002), involving all of the stakeholders to come to consensus (Menacker, Hurwitz, & Weldon, 1998; Mukuria, 2002), and measuring 'success' with multiple sources of data (Halverson 2007).

If a school is orderly and free from disruption, we believe this will be observable at key points. In addition to cultivating a school that promotes learning, we expect to observe few, if any, cases of extreme discipline issues, civil assemblies, and an ongoing effort to keep it so.

# Student support services

Students with special needs are statistically at greater risk of dropping out (Janosz, Archambault, Morizot, & Pagani, 2008). Leaders have a clear role in creating systems and safety nets for students that contribute to the school being an effective environment. Specifically, this includes building effective evaluation and structured intervention models (VanDerHeyden, 2007), building in programs for adult mentorship (Humphrey, Allred, Johnson, & Hourcade, 2009), and continuously revising and revisiting data to measure results (Christle, et al., 2007; Kelley & Shaw, 2009).

## Buffering the Teaching Environment

Finally, leaders can act in defense of the core learning activity that occurs inside classrooms with teachers. Leaders should be keenly aware that their impact on student learning is indirectly mediated (Leithwood, Seashore-Louis, et al., 2004) through the teaching and learning that happens in the classroom (Wahlstrom & Louis, 2008). Buffering the teaching environment from distraction is clearly a task that leadership can undertake to improve student learning (Leithwood, et al., 2010; Waters, et al., 2003).

Certain working conditions matter for teachers to do their job and ultimately increase student achievement. Stress and teacher burnout are a threat to student learning; Leithwood's (2006) review provides a review of conditions that improve the perceived effectiveness of teachers. This includes positive community relations, effective school operating procedures (for both culture and buffering), controlled change elements, course stability, and other items. He gives suggestions to leaders to control excessive demands, limit unreasonable constraints, and provide support.

Specific manifestations, in settings where these things happen, can be identified and used for formative leadership development. Leaders should be protecting teachers from parent 'bullying' (Leithwood, Menzies, & Jantzi, 1994) and encouraging parent allies (Fan, 2001), conveying a message to of achievements to the district and community towards relationships that further build school programs (Berg, et al., 2066; Epstein & Dauber, 1991), and develop 'check-in' procedures that make visits a welcome addition to

student learning, not a constant and distracting interruption (Bossert, et al., 1982;

Marzano, et al., 2005; Waters, et al., 2003).

# Domain 5: Maintaining a Safe and Effective Learning Environment

Clear, consistent and enforced expectations for student behavior

- Discipline policies are equitably and consistently enforced (Sheldon & Epstein, 2002).
- Teachers and leaders work together to ensure fair enforcement (M. Foster, 2004; Gottfredson, 2001).
- Teachers and leaders use data on student conduct and achievement to review and adjust policies (Halverson, 2007).
- Students take ownership by participating in the development and peerenforcement of behavior policies.

#### Clean and safe learning environment

- Safety policies and procedures reflect school conditions and are annually reviewed.
- Virtually no students are involved in fighting, theft, selling or using drugs, or are perpetrators or victims of harassment.
- Students regularly lead and interact civilly at school-wide assemblies.
- School-wide announcements that interrupt classroom teaching typically occur less than twice per day.

## Student support services provide safe haven for students who traditionally struggle

- The school effectively identifies students with special needs and successfully provides services to improve learning for most identified students (VanDerHeyden, 2007).
- Leaders work with teachers across the school to continually revise plans for improving attendance, dropout and graduation rates for students who traditionally struggle (Christle, et al., 2007).
- An extensive pool of adult mentors and advocates contact students in need to provide academic and social assistance (Humphrey, et al., 2009).

#### Buffering the teaching environment

- Leaders are able to help teachers deal with parent concerns when needed (Leithwood, Menzies, et al., 1994).
- Leaders are able to relate the message of successful achievement at the school to district and community leaders.
- Leaders are successful advocates for district resources and filter them effectively to teachers (Berg, et al., 2066).
- Leaders have established and regularly review reliable procedures to control access to the classroom (Waters, et al., 2003).
- Teachers welcome classroom visitors.

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Formative Leadership for Learning 45

Table 1: Review of Educational Leadership Classifications: 1995 to Present

Lea	Leadership Goals	oals	Leadership	Leadership Standards		Lea	Leadership Practices	seo	
Heller & Firestone*	Sheppard*	Hallinger & Heck	ISLLC**	围	Waters, Marzano, & McNulty	Spillane, Halverson, & Diamond**	Leithwood, et al.**	VAL-ED	Robinson, Lloyd, & Rowe
1995	1996	1999	1996	1998	2003	2004	2004	2006	2008
8 school study	58 school study	Lit Review	Org. Collaboration	Case Study	70 studies	Lit synthesis	Lit synthesis	Lit Synthesis	27 studies
4 Roles	4 Behaviors	4 Practices	6 Standards	9 Principles	21 Responsibilities	6 Macro Tasks	3 Practices	8 Dimensions	5 Dimensions
Sustain a vision for change	Construct & sell an instructional vision	Purposes	Facilitates a vision of learning	Organizing for effort	Culture Order	Construct and sell instructional vision	Setting directions: ID and articulate a vision	Vision for Learning	Establishing goals and expectations
Encourage Staff	Build norms of trust, collaboration, & academic	People	Advocating and sustaining a school culture	Clear expectations	Discipline Resources	Develop and manage school culture	Setting directions: Establish high expectations	Instructional Program	Resourcing strategically
Modify standard operating standards	Support teacher development	Structures	[Managing the organization for a safe environment]	Fair and credible evaluations	Curriculum, instruction, assessment Focus	Procure and distribute resources	Setting directions: Foster acceptance of group goals	Curricular Program	Planning, coordinating, and evaluating teaching and the curriculum
Monitor progress	Monitor instruction & Innovation	Social Systems	[Collaborates with community and responds/mobilizes resources]	Recognition of accomplishment	Knowledge of curriculum, instruction assessment Visibility	Support teacher growth and development	Setting directions: Using data to track progress & performance	Assessment Program	Promoting and participating in teacher learning and development
			Acting with integrity, fairness, and in an ethical manner	Academic rigor in a thinking curriculum	Contingent rewards Communication	Monitoring of instruction and innovation	Developing People: Providing teachers support	Communities of Learning	Ensuring an orderly and supportive learning environment
			[Understanding, responding, and influencing contexts]	Accountable talk(r)	Outreach Input	Establish a [orderly] school climate	Developing People: Offering intellectual stimulation	Resource Acquisition & Use	
				Socializing intelligence	Affirmation Relationship		Developing People: Providing models of best practice	Organizational Culture	
				Self-management of learning	Change agent Optimize		Redesigning the Organization: Strengthen culture	Social Advocacy	
				Learning as apprenticeship	Ideals/beliefs Monitors/evaluates Flexibility		Redesigning the Organization: Modify organizational Redesigning the Org.:		
					Situational awareness Intellectual stimulation		Build collaborative processes		
			Van Meter & Murphy, 1997	Resnick & Hall, 1998				Murphy, et al. (2006)	
* Wording changed to reflect leadership verbs.	to reflect leadership	verbs.							