



Developing Teaming Capacity of District-Level Teacher Leaders in Service of System Coherence

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Developing Teaming Capacity of District-Level Teacher Leaders
in Service of System Coherence

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by

Anda M. Adams

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
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The mind I love must still have wild places, a tangled orchard where dark damsons drop in the heavy grass, an overgrown little wood, the chance of a snake or two (real snakes), a pool that nobody's fathomed the depth of—and paths threaded with those little flowers planted by the mind.

- Katherine Mansfield

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Abstract

In recent years, school districts have paid increased attention to closing opportunity and achievement gaps while raising performance standards for all students. Historically, teaching has been characterized as professionally isolating, with teachers often operating independently in their own classrooms. Compounding the effects of this isolation, district central offices initially emerged to guarantee compliance with laws and regulations, and to implement necessary business activities. However, reaching every student in every classroom every day with high quality teaching requires systemic instructional leadership that begins with each classroom teacher and extends all the way to a district's superintendent. In Bellingham Public Schools, central office administrators, teacher leaders, principals, and teachers have been grounded in a common approach to instruction oriented toward fulfilling the goals of its strategic plan, The Bellingham Promise. The district's increased use of teacher leaders to help implement district-wide instructional improvements coincides with the transformation of central office leadership into a strong support for great teaching and learning in schools. This strategic leadership project sought to develop district-level teacher leaders into a collaborative team delivering coherent support to teachers across the district. The capstone outlines how these teacher leaders needed to transition from working independently in assigned content areas to collaborating as a team to effectively support teachers more holistically. Leveraging their unique position bridging teachers in the classroom and administrators in central office, I strove to identify how this team could increase coherence across the school system. While my role leading the team was limited by the duration of my residency, the leading indicators from central administrators, principals, teachers, and the team members themselves suggest that the team helped manage the tension that exists with implementing education reform between district-directed priorities and site-based autonomy to deliver on those priorities. This analysis includes both tactical and strategic implications for Bellingham Public Schools, as well as ideas for how these findings inform teacher leadership and central office transformation in the broader education sector.

Introduction

“We, as a community, make a collective commitment to Bellingham’s children.”

- The Bellingham Promise

Nestled in the northwestern corner of Washington State, between the snowy slopes of Mount Baker and the salmon-filled Salish Sea, the community of Bellingham has made a promise to the children living and learning there. While Bellingham may conjure up images of outdoor enthusiasts and craft beer drinkers, the complete character of the community also includes its first people – the Salish, Lummi, and Nooksack tribes that have worked, struggled, and celebrated life here for thousands of years – and its most recent arrivals – immigrants and migrants from Latin America, India, Vietnam, Russia, and elsewhere. This diverse community has promised that every child will be empowered “to discover and develop a passion, contribute to their community and achieve a fulfilling and productive life” (see Appendix A: The Bellingham Promise). This collective commitment emerged from Superintendent Dr. Greg Baker’s entry plan process when he joined the district and the Bellingham community in 2010.

In committing to develop children and young people with the knowledge, character attributes and orientation toward action they need to be successful and contributing members of society, Bellingham Public Schools (BPS) has set a high bar for the kind of staff it needs to deliver on that promise. Reaching every student in every classroom every day with high quality teaching requires systemic instructional leadership that begins with each classroom teacher and extends all the way to the district’s superintendent. In between are the teacher leaders, principals, directors of teaching and learning, and members of the executive team that provide strong support for great teaching through their instructional leadership.

District Context under Superintendent Greg Baker

The Bellingham Promise is our strategic plan. Staff at all schools, the Student and Parent Advisory Committees, the Bellingham Public Schools Foundation Board, employee association leaders, and a variety of other parent and community groups helped shape the first draft in 2012 and subsequent editions. This is a living document that is refined to reflect our community's values.

- The Bellingham Promise

Under Dr. Baker's leadership, the Bellingham Promise is alive. Every day, throughout the district, one can see the strategic plan in action. Adding a new bus run in November provides an "equitable distribution of resources and services to ensure excellence for all" by serving a community of highly-impacted students. Pairs of second grade teachers from across the district conferring about their instructional practice helps develop "readers and writers." A middle school's 8th grade team meets late on a Thursday afternoon to discuss how collectively they can help develop "confident individuals who consistently challenge themselves." And the executive team debates how a staff wellness program can help model "healthy, active individuals." This strategic plan has not sat on a shelf, waiting to be updated on a three, five, or ten year cycle. It has regularly been referenced and reviewed, analyzed and annotated, debated and deconstructed.

In the visual representation of the Bellingham Promise, "Great Teaching with Strong Support" is positioned as the central strategy for accomplishing the plan's ultimate goals: a set of 16 student outcomes that span knowledge (e.g. historians and global thinkers, scientists and mathematicians), character (dependable and responsible workers, respectful and compassionate humans) and action (e.g. effective communicators, innovators and creators). To ensure that there is high quality instruction in every classroom every day, the district endeavors to provide "purposeful and ongoing professional development of all staff"

and seeks to build “effective leadership throughout the organization” (Bellingham Public Schools, 2012).

Figure 1: The Bellingham Promise’s Key Strategies



With “great teaching” situated as the linchpin tactic within the district’s strategic plan, teachers are on the frontlines of delivering on the community’s promise. At a time when these teachers are being asked to meet increasingly diverse learning and language needs, to align instruction to meet new state standards, implement new curricula, and prepare students to succeed on new standardized assessments, support for professional learning is a critical focus of the work within the district.

Professional learning opportunities have grown substantially in recent years to address the changing context. A new four-year collective bargaining agreement between the Bellingham Education Association and Bellingham Public Schools was finalized in spring 2014, characterized by the Deputy Superintendent and the union president as having “tilled some new earth around creating time and space for professional learning” (M. Copland, personal communication, December 2014). This agreement contracts certificated teachers for 191 days, which maintains the required 180 school days for students while increasing educators’ opportunities for professional learning and collaboration through monthly teacher workdays embedded into the school year. This calendar represents a combination of teacher-, building-, and district-directed professional learning to balance the goals and needs of individual teachers, schools, and the district. Dr. Baker’s message to families at the beginning of the school year stated that the teacher workdays embedded into the school year were “used to increase opportunities for teachers and staff to learn and improve their practice” while helping “decrease the amount of time teachers are pulled out of the classroom and reduces the need for substitutes” (G. Baker, personal communication, September 15, 2014).

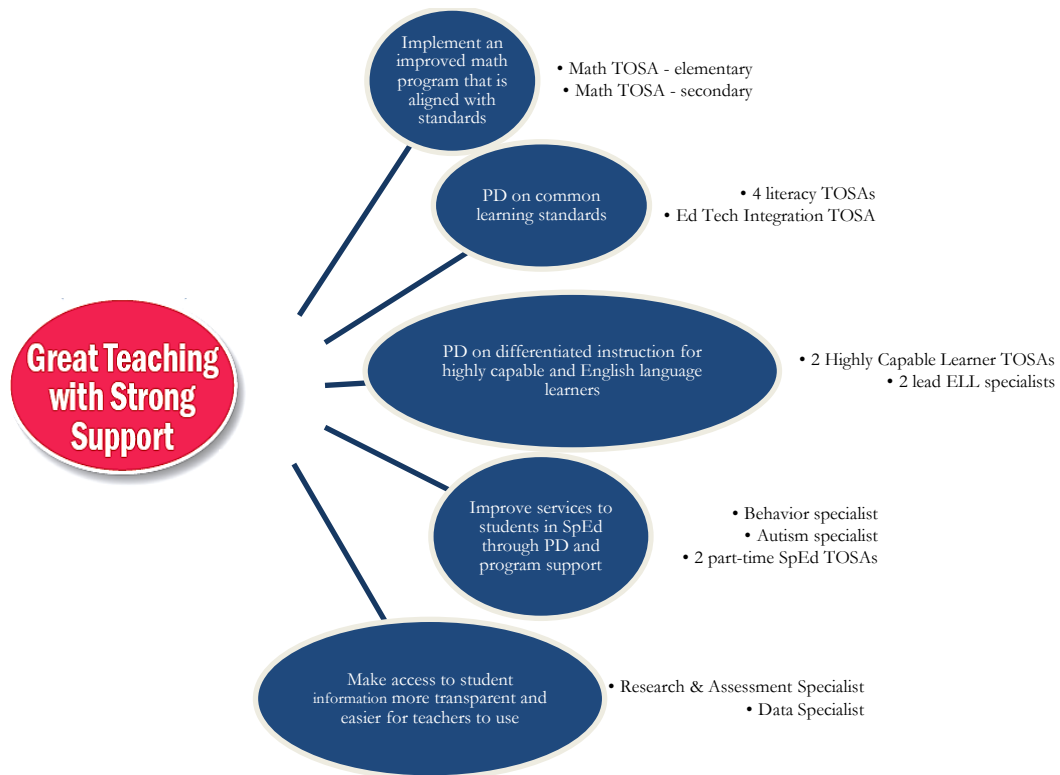
Along with this new time built into the district calendar, there was a concentrated “push around creating more coherent, focused professional learning opportunities” (M. Copland, personal communication, December 2014). This push was guided in part by the research of Garet et al. (2001) on the essential characteristics of effective professional development that have significant and positive effects on increases in knowledge and skills and changes in teaching practice. Effectively meeting the needs of more than 600 teachers and 36 s/assistant s in 22 schools in service of improved teaching and increased student outcomes for nearly 11,000 students exceeds the capacity of the Department of Teaching

and Learning's directors alone. Thus, BPS has a constellation of structures and individuals working together to achieve this coherence in supporting teachers in their ongoing learning and development: professional learning communities by grade and content areas, student growth collaborations, school-based coaches and specialists, principals, directors from the district's Department of Teaching and Learning (DTL), and district-level Teachers on Special Assignment (TOSAs) and specialists.

TOSAs and specialists are teacher leaders who support schools across the district through modeling, coaching, and providing professional learning opportunities to teachers in a variety of settings. Experienced educators who have excelled as classroom teachers and instructional coaches, TOSAs and specialists are hired for their expertise with specific content (literacy, math, technology integration, data & assessment, behavior) and/or student population (English language learners, special education, and highly capable learners) (see Appendix B: Select TOSA Job Descriptions). DTL directors whose work portfolios also include specific content areas and specific student population groups supervise them.

The number of TOSAs and specialists more than doubled for the 2014-15 school year, driven by identified needs in the system where the current capacity of the DTL directors and/or s was insufficient for the scope of work. These specific leadership positions map directly onto the current operationalization of the Bellingham Promise's strategy of "Great Teaching with Strong Support." The annually-developed "Priorities for Progress" align current initiatives to the five key strategies outlined in the Bellingham Promise and each of the current TOSAs and specialists serve in a capacity that relates to the top current priorities outlined in *Our Priorities for Progress 2014-15* (Bellingham Public Schools, 2014):

Figure 2: District Priorities and Current TOSAs & Specialists



The increased number of teacher leaders situated within the district office called for attention to how to collaborate across these content areas and district priorities to provide coherent support to teachers, s, and schools. The expansion in the number of TOSAs and specialists also emphasized a need to formalize their position within the central office; the loose arrangement that had existed in preceding years when there were relatively few TOSAs was neither sustainable nor desirable. According to one former central office administrator in reference to the growing number of TOSAs, “Now we add another layer and are getting other people with the same title of TOSA...None of the first set of questions [regarding the relationship between TOSAs and DTL] got answered, and then we added another layer of people.” The push for coherence among the teacher leaders both mirrored and contributed to the work that Dr. Baker and Dr. Copland had undertaken with the DTL directors.

Toward clarifying the role of the TOSAs and specialists, one DTL director drafted a document outlining the available details on the 2014-15 TOSA/specialist team in June 2014, just prior to my arrival. The vision for the team was:

Fulfilling the Bellingham Promise of Great Teaching with Strong Support, our vision for the TOSA team is to enhance the instructional and technical capacity of our teaching corps through high quality professional learning opportunities based on the CEL (Center for Educational Leadership) 5D (5 Dimensions of Teaching and Learning) Instructional Framework supported by a cohesive TOSA/Specialist team.

This drafted vision statement highlighted two developments that would shape some of the work of the TOSA/specialist team. First, the orientation around the “CEL 5D Instructional Framework” reflected the district’s relatively recent adoption of the University of Washington’s Center for Educational Leadership’s *5 Dimensions of Teaching and Learning Instructional Framework*. For the state-mandated adoption of a new Teacher and Principal Evaluation Program (TPEP), the 5D was selected as one of three eligible frameworks for districts to use. In 2011, the state’s Office of the Superintendent for Public Instruction (OSPI) awarded Bellingham Public Schools a regional implementation grant to become familiar with the new teacher and principal evaluation law (ESSSB 6696) and examine the three eligible instructional frameworks in preparation for system implementation beginning the following year. A principal and a teacher leader received training to become instructional framework specialists and convened stakeholders, including the union, in a transparent process to identify the right instructional framework for Bellingham. According to one instructional framework specialist, the selection criteria focused on 1) identifying what components in the frameworks connected to work Bellingham was already doing; 2) aligning framework language to current curricula and instructional programs; and 3) making an informed choice in the context of the region to increase inter-district alignment. As these stakeholders introduced the frameworks to their schools for further discussion and analysis,

teachers uncovered a new criterion: they wanted the chosen framework's experts to be accessible and responsive to inquiries about its details, applications and implications. In their recommendation to the district for an adopted framework, the stakeholders held that the non-profit status of a university increased its (fee-free) responsiveness to inquiries and would lead to more sustainable relationships and products; moreover, the geographic proximity of the university made additional support (trainings and consultations) easier to organize and more affordable. Following this adoption, professional learning about the instructional framework was primarily delivered through the district's training on the new teacher evaluation system. As the 2014-15 school year began, about one-quarter of the district's teachers had working knowledge of the instructional framework with another quarter slated to receive the training over the current school year. (The other half of the teaching corps would become part of the new evaluation system and receive the specific training during the 2015-16 school year.)

The second development highlighted by the drafted vision for the TOSA team was an explicit need for cohesion among those supporting teachers' professional learning. Professional development, as defined by the National Staff Development Council, is a "comprehensive, sustained, and intensive approach to improving teachers' and principals' effectiveness in raising student achievement" (Learning Forward, n.d.) It is grounded in a theory of continuous improvement and, when effective, has a direct impact on the everyday work of teaching and learning with students. Tony Bryk and his colleagues further substantiate the importance of ongoing professional learning from their research on school improvement in Chicago, where they found that teachers must take part in ongoing professional development to keep abreast of new knowledge and continue their individual growth (Bryk, Sebring, Allensworth, Luppescu, & Easton, 2010). A district's professional

learning system should primarily utilize the knowledge and skills of its own teachers and administrators, who are most familiar with the relevant context, with support from external experts as needed (Teacher Leadership Exploratory Consortium, 2011, p. 36).

In addition to learning a new instructional framework and evaluation system, Bellingham teachers, especially those working at the elementary level, were simultaneously responsible for implementing a new math curriculum; serving highly capable, special education, and English language learners in the same classroom; and teaching the new state standards. According to one teacher interviewed for a 2013-14 analysis of professional development in Bellingham, “It is a really confusing time to be a teacher. We have all these changes coming with the Common Core, but what are we supposed to do different? We can’t just work from a list of standards and check them off. We need more help really understanding what changes we need to make to instruction.” The breadth of initiatives being simultaneously implemented across the district warranted a concentrated focus on ensuring a coherent approach to the professional learning associated with all of these areas.

This strategic project examined the role of these district-level teacher leaders – TOSAs and specialists – in providing strong support to great teaching in Bellingham Public Schools. Through leading the development of a team of teacher leaders situated at the district’s central office, I sought to form a leadership theory for district-level teacher leaders related to their unique ability to bridge the gap between schools and central office and to use this theory to provide insight on how to best situate these leaders within a school district. The construction of this theory is traced through the organization of this capstone into four main sections. First, I outline the main bodies of research that informed my work with the TOSA/specialist team, including the role of teams and teaming as drivers of organizational learning and development, the conditions that enable the learning-focused leadership

approach of a central office, and the emergence of teacher leaders to meet the growing demands within the education sector. Building on this “Review of Knowledge for Action,” I describe the main activities related to the team’s development and the initial results of these activities in the context of the characteristics of effective teams. I then use the central office transformation literature’s enabling conditions to analyze the results of the team’s development as a bridge between schools and district office within a system seeking to balance holding tight on the expected outcomes while encouraging autonomy to find the best means of getting there. Finally, I reflect on this year of learning to offer recommendations for the way forward with district-level teacher leaders in Bellingham Public Schools and for the education sector as it considers where teacher leaders and district-level instructional leadership intersect.

Review of Knowledge for Action

Overview

Over the last five years, under Dr. Baker’s leadership, Bellingham Public Schools has been engaged in transforming the structures and processes of its central office departments, which historically are full of knowledge and skill but lacking sufficient connection with the actual learning process in the school system (often called silos), in service of enhanced instructional leadership and learning-focused partnerships throughout the organization. Driven by the clear focus of the Bellingham Promise, the central office, led by the executive team, is oriented toward working in collaborative relationships in service of students, families, and staff (see Appendix C: Central Services Organizational Chart). This transformational work reflects research by Meredith Honig, Michael Copland and their colleagues on the role that a district’s central office can play in improving school (and

student) performance. The term “learning-focused leadership” emerged from research on central office transformation to encompass a multi-leveled approach to instructional leadership, a term that has increasingly been used in the sector with respect to central office administrators and principals. Knapp et al. sought to be inclusive in their understanding of system-wide leadership and learning: “Learning-focused leadership asserts that its target is always and simultaneously the learning of students, of adult professionals at multiple levels of the educational system, and of the system itself, conceived of as a ‘learner’...” (Knapp, Honig, Plecki, Portin, & Copland, 2014, p. 13).

In pursuit of this system-wide learning-focused leadership, Bellingham’s Department of Teaching and Learning has experienced almost a complete overhaul in personnel, titles, and physical office space over the last four years. Several specific titles related to content or populations have been replaced with “Director of Teaching and Learning.” In 2013, Dr. Michael Copland joined Bellingham’s executive team as Deputy Superintendent to lead the DTL. Dr. Baker and Dr. Copland were committed to thinking innovatively about how to use learning-focused leadership and support to improve student outcomes. In August 2013, Dr. Copland led the DTL in drafting a departmental theory of action to guide its work as a team for the 2013-14 school year. In this theory, there was explicit attention to developing “clarity about our individual areas of primary work” and “working collaboratively and breaking down traditional silos in the central office” to provide support based on the needs of principals, schools, and students, which signaled clear attention to developing a more coherent approach to support of schools from central office.

At a daylong retreat in August 2014, recognizing the addition of three new members to the DTL team, the directors reviewed their theory of action for 2014-15, testing its efficacy, what City and Elmore (2009) require when holding that the theory must be

empirically falsifiable, from the experience of the previous school year. This process reflected what City and Elmore suggest as necessary, since “people learn to treat their theories of action as touchstones for their own professional and cognitive development, as works-in-progress along a path that leads through successively greater levels of understanding of the work” (2009, p. 53). The revised theory of action enhanced the focus on collaboration by including the descriptor “collective” into developing “clarity about our individual and collective areas of primary work.” It eliminated specific mention of breaking down silos, signaling a sense of progress made on this front over the last few years. Other revisions in the theory of action refined the actions that the DTL would take to support principals: the inclusion of an “identify and understand the needs of principals/schools” step; reference to “differentiated, relevant” coaching; and the substitution of “purposeful, effective” for “predictable/high quality” to describe the professional learning provided (see Appendix D: DTL Theory of Action). Of all the revisions, the removal of the “traditional silos” phrase elicited the most debate among directors, with some feeling that the work was still in progress and should continue to be openly named as part of the department’s theory of action. Others held that, while more work was needed, the focus of the theory should be on the actions directly related to the support of principals and schools, and that the gritty process details did not need to be explicitly spelled out. The different perspectives on the rate of progress toward more coherence reinforced that the work of central office transformation is an ongoing process requiring persistent attention over time and throughout all parts of the organization to be effective and sustainable.

Over the past few decades, a great deal of research on instructional leadership, called at times “leadership for learning,” “learning-centered leadership,” “student-centered leadership,” and “leading for learning,” has focused on the role of the principal at the school

level (Knapp et al., 2014, p. 4). Hallinger & McCary (1990) set out a model of principal instructional leadership that identifies over twenty core functions that together demonstrate that the principal is responsible for defining the school's mission, managing the instructional program, and promoting school climate. Demands on principals have expanded in recent years “always adding to and never subtracting from the job description” and, as Copland argues in his 2001 *Phi Delta Kappan* article “The Myth of the Superprincipal,” “aggregate expectations for the principalship are so exorbitant that they exceed the limits of what might reasonably be expected from one person” (Copland, 2001, p. 529). Given these growing demands, principals cannot be expected to be the sole instructional leader in a school. Increased attention to distributive and collective leadership have addressed both ends of the school system – bringing teachers in schools and administrators in central office into a conversation around providing support to principals.

With respect to the school side of the system, the general use of teachers as leaders has been relatively narrow in scope nationally. In a qualitative survey of school district administrators, Barnett Berry and the Center for Teaching Quality found that “all too often, principals are wary of teacher leaders, primarily because of uncertainty about how to identify and utilize them” (Berry, 2014). In his doctoral dissertation, Dr. Baker analyzed the use of instructional coaches in schools and districts, with particular attention to who supervises coaches (principals or district administrators). He found that, due to a history of distrust and miscommunication between principals and district office, most principals believed that instructional coaches should be assigned to one school so that they could “establish necessary trust with both teachers and administration and build themselves into the fabric of the school” (Baker, 2010, p. x). This position understandably can contrast with the perspective from central office, where one district administrator said, “If coaches are given

to buildings, then their loyalty will be to buildings, not the District...if you centralize too much, you lose the ability to have a center” (Baker, 2010, p. 2).

With respect to administrators, there has been increased attention to how to transform a central office into a system of support focused on how to improve teaching and learning in all schools. This system of support requires district administrators to work side-by-side with school administrators to collectively build the capacity of the whole system. To do this well, central offices need to re-evaluate the district office’s systems and structures, including who is in central office and what they do on a daily basis, to ensure that they are positioned to support improved teaching and learning. This type of transformation is more akin to a shifted mindset than simply a set of reforms enacted once: “central office transformation involves ongoing work on central office practice that supports teaching and learning improvement and that transcends particular programs or initiatives” (Honig, Copland, Rainey, & Lorton, 2010, p. ii).

Examinations of the research on teacher leadership and the principles of central office transformation are included in the Review of Knowledge for Action section. However, it is worth noting here that what is missing from this area of research is a clear conception of how a district organized around learning-focused leadership can best utilize district-level teacher leaders, who, by the nature of their position bridging schools and district office, offer unique perspectives, capacities, and vectors to advance the goals of improved student learning.

District-level teacher leaders who can effectively bridge the work of teachers in classrooms and central office administrators are one answer to the “myth of the superprincipal.” Understanding and elevating the role of teacher leaders can help increase alignment between teachers’ professional goals and the district’s goals. A recent poll of

teachers found that while nearly 70 percent of teachers felt their voices are heard in their school, only one in three felt heard in their district (Markow & Pieters, 2011). Effective bridging between classrooms and district office means increasing the mechanisms by which teachers can be heard by the central office.

Teacher leaders can play an instrumental role in designing and delivering effective professional learning that meets the diverse needs of the teachers in a coherent and meaningful way. Quality professional development is enhanced by norms that focus on alignment and coherence. However, to achieve the coherence necessary to ensure quality professional learning, those teacher leaders working with teachers across the district must work together as a unit to ensure that they are speaking with a consistent voice with respect to quality instruction. Having a cross-functional teamwork together brings multiple perspectives to addressing challenges but needs to operate as a cohesive unit to ensure that the client is not served in a fragmented way.

The research questions I sought to answer through this strategic project focused on the development of the team of teacher leaders and the intended outcomes to be achieved by that team with respect to increased coherence between schools and central office:

- How can a group of individual teacher leaders be developed into an effective team to support teachers in their professional learning?
- How can a team of teacher leaders serve as an effective bridge between classroom teachers and central office administrators to improve teaching practice and student learning?

With these guiding questions in mind, I examined three bodies of research to find the connections between the development of the team and its collective work and the broader improvement efforts around teaching and learning in the district. First, I reviewed the growing body of research on teams and teaming as drivers of organizational learning and development. The literature positions teams as both central to organizational learning and

key to instructional leadership. Examining the current focus of organizational theory on teaming and the available evidence of its importance within the context of public education is important for a profession that has historically been regarded as individualistic and professionally isolating. Teachers operating independently in their own classrooms have been the norm for over a century. Yet there is mounting evidence that teaming has elevated the performance of organizations across a variety of professional contexts, which can inform the education sector as school cultures try to shift away from this historical tendency.

Second, given its placement within the Department of Teaching and Learning, the TOSA/specialist team is part of the learning-focused leadership approach of the central office. The recent expansion of the team is both an outcome of the system's focus on connecting leadership to learning and a more robust vector by which the district office can support improving instruction in schools. Therefore, an understanding of the research on how central offices can support the instructional work at the school level (known as the principles of central office transformation) is important to envisioning the role of TOSAs and specialists as system-level instructional leaders working in alignment with district office administrators and schools.

Finally, the TOSAs and specialists are teacher leaders. This growing community of professionals within the education sector is receiving increased attention in the research and in practice. As district-level teacher leaders, the TOSAs and specialists serve as a bridge between the district office and schools by using their understanding of both environments to facilitate better communication and understanding and to manage the tension between the priorities and parameters held tight by the district office and the level of autonomy needed to be effective in classrooms. These three bodies of research will inform both the strategy employed to facilitate development, and the analysis of how the development proceeded.

Developing a team of teacher leaders that functions well within the context of a central office committed to learning-focused leadership and works effectively with teachers, principals and schools that are engaging in their own improvement efforts in service of student outcomes is an embodiment of ensuring great teaching with strong support.

Teams and Teaming

The word “team” is used frequently in work environments today without any strict adherence to a definitive meaning. In contrast to other work groups that may exist within an organization, a team is one that requires interdependent work and mutual accountability to be successful. Amy Edmondson asserts that “essential learning in organizations occurs not through individuals working alone to sort through and solve important problems but rather through people working and learning collaboratively in flexible teams” (Edmondson, 2012, p. 283). Striking a balance between the collective and the individual is at the heart of successful team development. In his research on leading teams, J. Richard Hackman (2002) poses three success criteria that align with this definition of a team: to serve clients well, to grow as a team, and to learn as individual members. Accomplishing this “can be no small matter in organizations that traditionally have been designed and managed to support and control work performed by individuals rather than teams” (Hackman, as quoted by Stark, 2002). While a leader needs to “deal with [the team] as a *team* rather than as a set of individuals,” Hackman acknowledges that individuals must have space to grow in order to help the team succeed (Hackman, 2002, p. 41).

Characteristics: Katzenbach & Smith (2005) lay out five characteristics of a team that together differentiate them from other work groups: 1) a meaningful common purpose shaped by the team; 2) specific performance goals related to that purpose; 3) a mix of

complementary skills; 4) a strong commitment to how the work gets done; and 5) mutual accountability. As these characteristics indicate, teams operate where the barriers to optimal performance are too great for individuals to surmount alone. In alignment with Katzenbach & Smith's characteristics, Hackman (2002) offers five enabling conditions that are necessary for successful teams: 1) a stable team; 2) a compelling direction for work that is challenging, clear, and consequential; 3) an enabling team structure; 4) a supportive organizational context; and 5) the availability of competent coaching. Narrowing specifically to work conducted in the education sector, DuFour et al.'s work on Professional Learning Communities (PLCs) echoes the importance of these same characteristics: "The first and most fundamental task of building a collaborative culture is to bring together people whose responsibilities create an inherent mutual interest in exploring the critical questions of a PLC" (DuFour, DuFour, Eaker, & Many, 2006, p. 93). While Wenger et al.'s (2002b) research on Communities of Practice may differ from other types of teams with regards to composition, it highlights important aspects of process and outcomes that resonate with the other research on teams summarized. Additionally, they offer details on the support role that organizations play to help the community succeed: "valuing the learning they do, making time and other resources available for their work, encouraging participation, and removing barriers" (2002b, p. 13). A supportive organizational context pays attention to how the team is integrated into the broader organization by "giving them a voice in decisions and legitimacy in influencing operating units, and developing internal processes for managing the value they create" (2002b, p. 13). The close alignment of key characteristics across the leading literature on effective teams, as well as the unique perspectives of the individual areas of research, is evident in summary table below (see Table 1: Characteristics of Effective Teams).

Table 1: Characteristics of Effective Teams

Characteristics	Katzenbach & Smith (2005)	Hackman (2002)	DuFour & Eaker (1998); DuFour et al. (2006)	Wenger et al. (2002)
<i>Purpose</i>	Meaningful common purpose shaped by the team	Compelling direction for work that is challenging, clear, consequential	Shared mission, vision, and values; exploring critical questions	To create, expand, and exchange knowledge; to develop individual capabilities
<i>Composition</i>	Mix of complementary skills	Stable team	Collaborative teams; responsibilities create an inherent mutual interest	Self-selection based on expertise; passion, commitment and identification with group and its expertise
<i>Process</i>	Strong commitment to how the work gets done	Supportive organizational context	Collective inquiry; action orientation, experimentation; Need one another to accomplish goals not achievable alone	Balance between joint activities where members explore ideas together & production of documents/tools
<i>Support</i>	Mutual accountability	Enabling team structure; availability of expert coaching	Support from administration; time set aside to collaborate	Learning is valued; providing time & resources; encouraging participation; removing barriers
<i>Outcomes</i>	Specific performance goals related to purpose	Serve clients well; grow as a team; learn as individuals	Results orientation	Development of shared practice within given domain

As illustrated in the above table, Katzenbach & Smith note that a strong commitment to how the work gets done is an essential component of successful teams. Edmondson’s (2012) focus on “execution-as-learning...learning from the work is part of the work” (2012, p. 284) is one way that “the work gets done.” This is particularly apt in the case of education. High quality classroom instruction depends on students actively learning from the work that they are engaged in. For organizational systems to learn and grow, this “execution-as-learning” must extend through all levels of the system; yet, as one moves up further away from the classroom, it becomes increasingly rare to see individuals demonstrating their own learning. Situating their argument in a modern education context that has increasingly relied upon external consultants to do the hard work of reform, City and

Elmore elaborate what “execution-as-learning” this means in the context: “We learn to do the work by doing the work, not by telling other people to do the work, not by having done the work at some point in the past, and not by hiring experts who can act as proxies for your knowledge about how to do the work” (City & Elmore, 2009, p. 32).

Yet asking high-achieving people to learn in public with colleagues is, for many, anathema to the way they have conceived of success. As Argyris articulates in *Teaching Smart People How to Learn* in a story about successful business consultants, “behind this high aspiration for success is an equally high fear of failure and a propensity to feel shame and guilt when they do fail to meet their high standards” (Argyris, 1991, p. 104). Thus, although the benefits of teamwork are clear in the research, working in teams potentially raises the anxiety for those who fear failure since the work is, by definition, interdependent and therefore failure affects others.

Crucially, to effectively learn from execution, members of a team must feel safe being and learning as part of that team. An expert on organizational culture, Schein (1985) refers to the need for psychological safety to help people overcome “learning anxiety.” Edmondson’s research continues to build on how the presence of psychological safety benefits the learning process. Higher levels of psychological safety lead members to voice their thinking, which, in turn, can enable clarity of thought, support positive conflict, and mitigate failures (Edmondson, 2012, p. 126). Similarly, in their work on change leadership, Wagner et al. (2006) find that effective teams “create a climate of intellectual engagement, where questioning, dialogue, and respectful debate become the norm in all meetings” (2006, p. 69). Wagner’s “climate” is created by what Edmondson identifies as the dual presence of high psychological safety and high accountability, termed the “learning zone” where people can “easily collaborate, learn from each other, and get the job done” (2012, p. 131). Getting

high levels of both psychological safety and accountability, however, is no easy task.

Edmondson's suggestions for creating a "learning zone" focus primarily upon the actions of the organization's leader to create a psychologically safe environment. Edmondson finds that while there are traits of leaders that may lead to a safe environment, such as being "supportive, coaching oriented, and nondefensive in response to questions and challenges," safety is not created through leader moves alone. Instead it is a "shared sense developed through shared experience" (Edmondson, 2012, p. 137).

Similarly, Fink and Markholt (2011) draw on Richard Elmore's concept of reciprocal accountability as one way to affect the levels of psychological safety and accountability. They suggest that individuals can improve their own practice by making their learning public, but they must be assured of support through explicit leadership in teaching and learning. This reciprocal accountability – making one's practice public in service of improvement in exchange for sufficient support to be able to achieve that improvement – is also not new to education; it is the centerpiece of effective student-teacher relationships. Although it is much less evident as one moves higher up in the system, it is equally important for educators to engage in continuous learning in their own practice (Fink & Markholt, 2011, p. 222). According to their job descriptions, TOSAs and specialists are hired to "provide leadership in professional development" and having "demonstrated successful experience working with adult learners" and therefore may be particularly well positioned to help carry out this reciprocal accountability by both being public with their own practice and offering the support to teachers to improve.

The evidence from organizational research and evidence from practice is clear that teams can increase the collective impact of individuals with adequate attention to the enabling conditions associated with success. However, the education sector is steeped in a

long history of isolation, individualism and egalitarianism. As the one-room schoolhouse gave way to the multi-classroom school building to accommodate the growing number of students, the increased number of teachers were no more connected to each other than when they had worked in separate villages. Much like the factories that had sprung up across the country, teachers were engaged in “assembly line education” where teachers were “working in isolation with minimal supervision” (and training) and generally regarded as interchangeable with one another (Troen & Boles, 2012, p. 3). Teachers worked alone, keeping their heads down, and rarely sought or offered advice. Troen and Boles state that teachers were regarded as equally competent, and, therefore, (according to the above definitions of a team), there was no need to be working in a team. In his 1975 study of teachers and teaching, Lortie found that when he asked teachers how they would choose to spend a gift of 10 work hours per week, more than 90 percent chose individualistic activities – those teacher perform alone – that take place in the classroom with students, not with other colleagues (Lortie, 1975, p. 164).

In many places, this model and mindset have persisted into the current century. However, in his forward to Troen & Boles’ work on the power of teacher teams, Elmore states that “there is no other way to improve instructional practice at scale in schools than to organize groups of adult learners to work on problems of instructional practice and to weave those groups into an organization-wide strategy of improvement” (Elmore in Troen & Boles, 2012, p. xv). Improving instructional practice amidst continuous change requires organizational learning, the process by which the teachers and administrators within a school district are all learning. For this individual learning to lead to improvement, the learning must be shared. Edmondson (2012) holds that this sharing occurs most effectively through teaming: “teaming is the engine of organizational learning” (2012, p. 14). Senge et al. (2006)

wrote, “history has brought us to a moment where teams are recognized as a critical component of every enterprise – the predominant unit for decision making and getting things done” (2006, p. 354). Troen & Boles predict that “the educational model of teachers collaborating in teams, if it has not already arrived in your school, is certainly the wave of the future” (Troen & Boles, 2012, p. 5). Edmondson characterizes teaming not just as the new fad in organizations, but absolutely essential to organizational survival in a rapidly changing world.

Since TOSAs and specialists are considered teachers with one-year contracts for this leadership position (although the role is often extended to two or three years), they may be able to maintain closer relationship with their teaching colleagues than former teachers who have transitioned into building or district administrators. TOSAs and specialists do not have any role in teacher evaluation and are usually supervised (and evaluated) by DTL directors. They remain members of the teachers’ union and some articulate an intention of returning to the classroom when this particular assignment is completed. It should be noted, however, that the TOSA role has been one of the clearer paths for classroom teachers who are seeking higher levels of leadership and responsibility. As one current TOSA said,

In thinking about the people who are in the [TOSA] roles right now, I doubt any of them go back to the classroom. I am pretty sure most of us stepped out of the classroom because we were wanting more leadership....This is definitely seen as a path, a lot of people see it as the next step to an administrator role.

Several former TOSAs are now DTL directors and school principals in the district.

However, in endeavoring to keep one foot in the classroom as practitioners and one foot in the central office as instructional leaders in these current roles, the TOSA/specialist team resembles what Wenger and his colleagues term a Community of Practice: “this *multimembership* creates a learning loop” where they are using their team setting to “apply and

refine their skills [and] invent new solutions” and using their teacher community “for developing a practice” (Wenger et al., 2002b, p. 18). In this way, the TOSAs and specialists may be able to utilize their content knowledge and skills and “their dual roles as both community practitioners and operational team members [to] help link the capabilities of communities of practice to the knowledge requirements of teams and business units” (Wenger et al., 2002b, p. 18).

While schools and systems are making time and space for teachers to collaborate on teams, through PLCs and other structures, in the absence of the essential characteristics of effective teams, these efforts may be falling short. In a recent Gates Foundation-funded study of teacher and principal perceptions of professional development by the Boston Consulting Group, teachers on the whole were least satisfied with the professional learning communities offered in their schools and districts, despite finding that nearly 70 percent of teachers surveyed had participated in a PLC in the past twelve months and most teachers expressed a desire to collaborate with colleagues (Boston Consulting Group, 2014). Many teachers in the survey saw their different types of work falling into two broad categories – following rules or focusing on students. For many, professional development was categorized as an exercise in compliance, rather than an effective way to focus on students (Boston Consulting Group, 2014, p. 11). Thus, while organizational learning research espouses that teams are the key to the future of organizations, the effectiveness of those teams, professional learning communities being one example, depends on the existence of the key characteristics, including having a common purpose shaped by the team and a reliance upon one another to accomplish goals not achievable alone (DuFour et al., 2006; Hackman, 2002; Katzenbach & Smith, 2005).

City and Curtis (2009) provide a link between the importance of teams and the principles of central office transformation. In working with senior leadership teams across numerous organizations, the authors assert that the functionality of the senior leadership team drives how the rest of the organization functions. Moreover, the signs are obvious and align with the characteristics of successful teams identified by Katzenbach & Smith, Hackman, DuFour, and Wenger. City and Curtis maintain that “after observing a single senior leadership team meeting, we can predict, quite accurately, four things about the system as a whole: 1) how people through the system treat and interact with each other; 2) the level of focus and discipline brought to the work of instructional improvement; 3) the extent and quality of collaboration within the organization; and 4) the team’s impact on the work of the system” (Curtis & City, 2009, p. 39). Observing a present-day BPS executive team meeting provides evidence that aligns to this four-point checklist: a litany of “Celebrations and Acknowledgments” at the start of each weekly meeting that demonstrate the close work that occurs across departments and the high esteem with which executives hold each other (#1 and #3); the composition of the team being heavily weighted toward the DTL (#2); and the frequent inclusion of teachers, principals, and other administrators in executive team discussions to better inform the decisions of the team (#4). While Dr. Baker’s work to create such leadership team may signal positive things about the system as a whole, embodiment of these characteristics at all levels takes concentrated attention and time to develop. As Senge asserts, “teams are microcosms of the larger organization” and, therefore, an understanding of the organizational structures and processes within which a team is operating is essential to understanding how and how well the team will function (Senge, 2006, p. 251).

Central Office Transformation

Over the last few decades, the demands on and expected role of the school district's central office has changed dramatically as the efforts to improve teaching and learning in schools have increasingly shown that support from central administration is necessary for success. Historically, central offices were initially established to handle enrollment logistics, regulation compliance, and financial management and left the work of instruction to schools. However, evidence from the last 25 years indicates that school reform and improvement efforts have often fallen short in part because of failure of implementation by the central office (Bryk, Sebring, Kerbow, Rollow, & Easton, 1998; Knapp et al., 2014; Ravitch & Viteritti, 1997). In recent decades, policy changes at both the state and federal levels have placed increased demands on school districts, impelling them to get into the business of school improvement. Earlier efforts to improve the effectiveness of central office are referred to by Honig (2013b) as “tinkering at the margins of central offices” and are summarized by Knapp et al. (2014) as either “improving central office responsiveness; bolstering central offices’ professional development role; maximizing school autonomy while minimizing central office presence; [or] recasting the central office as a portfolio manager” (2014, pp. 86–88). The research suggests that none of the strategies alone can fundamentally change the work of central office to effectively support schools to build their capacity to help all students succeed. Instead, what is needed is “central office transformation” – an act of dismantling current central office structures and “erecting new performance-focused organizations providing high-quality services to support school results”(Knapp et al., 2014, p. 89).

In seeking to answer the question, “What does it take for leaders to promote and support powerful, equitable learning in a school and in a district?” a team of researchers,

largely funded by The Wallace Foundation, has undertaken a deep study of how central offices can lead instructional improvement across an entire district (e.g. Honig, Copland, Rainey, & Lorton, 2010; Honig, 2013; Knapp, Honig, Plecki, Portin, & Copland, 2014; Leithwood, Louis, Anderson, & Wahlstrom, 2004). Based on that research, three core elements emerged as vital components of successful central office transformation (Honig, 2013a, 2013b; Knapp et al., 2014):

1. Establishing learning-focused partnerships between the central office and schools
2. Differentiating central office services aligned to help schools build capacity for teaching and learning
3. Performance-oriented district leadership supporting continuous improvement by engaging in teaching and learning together with staff

In order to realize these vital components, the researchers conducted thorough studies in three initial sites – Atlanta, New York, and Oakland – and tested their findings in a number of other partner sites. Through this work, Honig & Copland (in Knapp et al., 2014, p. 103) identified five enabling conditions that offer a starting point for engaging in the true transformation of the district office:

1. Getting the right people in the right roles and clarifying work to be done
2. Anchoring the work to an explicit theory of action
3. Continuously supporting professional learning of leaders
4. Protecting people's work so it can stay focused on learning improvement
5. Developing and using evidence through/about central office practice to support continuous improvement in the performance of central office

These five enabling conditions align closely with the work that TOSAs and specialists are expected to do; they are well positioned to play an important role in helping a district transform itself by bridging the work between district office and schools. In their role as district-level teacher leaders, TOSAs and specialists are positioned to work in partnership with both schools and central office, provide professional learning in service of improved instruction, and facilitate staff throughout the system to learn together. They are a part of Bellingham's transformation of central office.

The principles of central office transformation represent the goal line for where a district office focused on supporting improved teaching and learning is heading. In the case of Bellingham, understanding these enabling conditions helps make an argument for why the emerging TOSA/specialist team should be part of the conversation about how central administration can better serve schools. However, this literature makes little mention of the specific role that teacher leaders play in helping to bring those enabling conditions to fruition, providing an opportunity to contribute the findings from this strategic project to the larger work around education system reform.¹

Teacher Leadership for Coherent Support to Schools

Teacher leadership means having a voice in the policies and decisions that affect your students, your daily work, and the shape of your profession. It means guiding the growth of your colleagues. It means that teaching can't be a one-size-fits-all job – that there must be different paths based on different interests.

- U.S. Secretary of Education Arne Duncan.

It is well established that quality teaching is the most important school-based factor contributing to positive student outcomes (e.g. National Commission on Teaching and America's Future, 1996; Rivkin, Hanushek, & Kain, 2005). Teachers continue to gain content and pedagogical knowledge and skills after their initial pre-service preparation through ongoing professional learning opportunities during and after school, on weekends and over the summer. The quality of professional learning in a system directly impacts the effectiveness of its teachers. Advancements have been made in the past twenty years to codify what constitutes high quality professional learning. In Chicago, Bryk's research on the essential supports needed for school improvement highlights the links between the quality of professional development, the robustness of the professional community, and student outcomes: "High-quality professional development in the context of a supportive

professional community and where teachers were oriented toward improvement appears powerfully related to gains in academic productivity” (Bryk et al., 2010, p. 113).

Research shows that teacher leaders have a particular role to play in creating that supportive professional community and in “guiding the growth” of teachers’ practice. In their research on teacher leaders, Louis et al. find that while principals and district leaders have the most influence on school decisions, they primarily influence the working conditions and teachers’ motivation, not their knowledge and skills, something that teacher leaders are better positioned to influence. Moreover, influence is not a zero-sum game; school and district leaders “do not lose influence as others gain influence” (Louis et al., as quoted in Portner & Collins, 2014, p. 27). Instead, as principals leverage the strengths of their staffs, the whole system improves:

Great principals do not pluck their acumen and resourcefulness straight out of the air. In our data, successful schools weren’t led by philosopher kings with supreme character and unerring method, but by a steady accumulation of common wisdom and hope distilled from vibrant, shared experience both with teacher leaders in schools and colleagues district wide. (Rosenholtz, as cited in Fullan, 1991, p. 161)

In their summary of the history of teacher leadership, Stoelinga & Mangin (2010) note two forces that have impelled greater attention to teacher leadership over the few decades: efforts to professionalize teaching and the move toward greater accountability. Recognizing that teachers’ knowledge and expertise were underutilized in efforts to improve educational outcomes in schools, formal teacher leader roles have emerged across the country and have been incorporated into reform initiatives led by the federal government, private foundations, professional organizations, and districts (2010, p. 5). This expanded use of teachers as leaders within schools has led to an increase in research and theory on teacher leadership, although it is almost completely focused on school-based teacher leaders. In their definition of instructional teacher leader roles, Stoelinga & Mangin include “school-

level” as one criterion: “We view teacher leadership as rooted within the school building and teachers’ classrooms. This is in contrast to district-level support roles (e.g. curriculum specialists) or professional development that takes place off-site” (2010, pp. 6–7). Creating this separation between school-based teacher leaders and district-level curriculum specialists leaves limited room for finding evidence about teachers working at the district-level across multiple schools.

Also in response to the expanding use of teacher leaders, the Teacher Leadership Exploratory Consortium developed a set of Teacher Leadership Model Standards that were “intended to codify, promote, and support teacher leadership as a vehicle for transforming schools to meet the needs of 21st-century learners” (Teacher Leadership Exploratory Consortium, 2011, p. 8). By defining seven domains of leadership, rather than an explicit job description, the model standards created some space for teacher leadership to expand beyond school-based work to include the district and even the profession. However, each domain’s main focus remained on school-based teacher leadership through “hybrid roles for teachers” and “shared or distributed leadership structures within schools” (2011, p. 27).

As outlined earlier, the 2014-15 school year in Bellingham was the first of a four-year contractual agreement with the teachers’ association that included a new calendar that embeds monthly non-student days dedicated to professional learning and teacher support into the school year. The content of these regular professional learning opportunities, in addition to trainings and workshops that occur during the school day (with the use of substitute teachers), after school, and during the summer, was guided by a renewed focus on coherent and focused professional learning, informed by the research of Garet et al. (2001). This attention to coherence across the system is further supported by Guskey’s (2002) guidance to orient the processes toward the ultimate outcomes, identified in Bellingham as

developing children and young people with the knowledge, character attributes and actions needed to be successful and contributing members of society. Echoing the principles from Garet and his colleagues, Bryk et al. found that professional learning should “build on (and on occasion challenge) teachers’ prior beliefs and experience, provide sufficient time and follow-up for sustained inequity and problem solving, and create opportunities for analysis and reflection”(Bryk et al., 2010).

While Bryk maintains that professional learning should be directly related to teachers’ beliefs and experience, recent research sponsored by the Gates Foundation indicates that there is a significant mismatch between what teachers’ want in their professional development and what is being offered by their principals and district administrators (Boston Consulting Group, 2014). Effective professional development remains “the \$18 billion unanswered question in the country – money spent every year on teacher professional learning of various kinds, about which very little is concretely understood in terms of impact on either teacher practice or student learning” (M. Copland, personal communication, December 2014). Given the need to find ways to make professional learning more relevant to the teacher, specifically through embedding new learning into the daily work of teaching, TOSAs and specialists may be very well positioned to serve as a bridge between administrators and teachers by providing job-embedded learning that is closely linked to district priorities. Gallucci’s work on instructional coaching uncovered evidence of this conjecture: “We know that teachers who take on the role of coach are viewed as sharing leadership for instructional reform with central office leaders and principals and there is some evidence that coaches can act as mediators between district-directed reform efforts and classroom practice” (Hubbard et al. 2006 and Swinnerton, 2007, as cited in Gallucci, Van Lare, Yoon, & Boatright, 2010, p. 920).

In terms of setting the conditions to change practice, Knapp et al. assert that teacher leaders have “the ability to connect with teachers on a teacher-to-teacher level and form comfortable relationships where evaluation was not a factor seemed to contribute to the ability of teacher leaders to have an impact on teaching and learning at the classroom level” (Knapp et al., 2014, pp. 43–44). In their description of teacher leaders, Portner & Collins offer a narrow conception of teachers leaders, holding that, although “over time some may decide that they can exercise their leadership and affect teaching and learning more directly as an administrator,” until they do make that formal change in roles, “they are teacher-leaders” (Portner & Collins, 2014, p. 42). Mark Smylie’s work on teacher leadership development over the past several decades offers a more complicated account of role that shows the possibility of separation. With respect to the relationship with teacher colleagues, the release time from the classroom that is required to carry out the leadership functions “may delegitimize the roles from the perspective of other classroom teachers” (Smylie, 1998, p. 548). The role ambiguity that emerges from these hybrid positions raises questions about whether a teacher leader should identify as teacher or administrator, as “an instructor of students or a leader of teachers” (1998, p. 548).

According to Knapp (2014), Portland Public Schools invested heavily in a new cadre of 60 teacher leaders deployed across the district to support particular areas of work, including special education, highly capable, and English language learners. However, the strategy for how to utilize these district-level teacher leaders was lacking and the initiative suffered from bureaucratic barriers, miscommunications about reporting lines, and inability to match demand for services to actual supply of teachers (2014, p. 137). Expanding the use of district-level teacher leaders is not a surefire way of supporting teachers in improving their practice; as indicated in the research on teams above, agreement on a common purpose, a

commitment to the way the work is carried out, and support from within the organization can help transition a group of qualified individuals into a high-functioning team with a coherent approach to achieving the goals of organization.

While the role varies considerably across schools and districts, teacher leaders are often tasked with liaising between their classroom teacher colleagues and school and district administration. Knapp et al. (2014) characterize research to understand teacher leadership as the “attempt to make sense of the ambiguous, and sometimes contested, role that teachers take on who are positioned ‘in between’ the classroom and supervisory leaders at either the school or district level” (2014, p. 11). They note a gap in the available research in “how [teacher leaders] establish secure footing for their work, actually engage in problems of teacher practice and leadership practice, and stimulate changes in teaching practice that actually improve student learning” (2014, p. 11). This project seeks to help narrow this gap in the literature by utilizing the existing knowledge on teams and teacher leadership within schools to help establish a theory on teacher leadership within a district’s transforming central office.

Additionally, the district-level teacher leadership role may be well situated to improve policy coherence. As Honig & Hatch (2004) define it, policy coherence in a district is the process of strategically handling the demands of external bodies to strengthen school performance. Schools and central services work together to “continuously craft or negotiate the fit between external demands and schools’ own goals and strategies” (2004, p. 17). After schools have set their own goals, they are empowered, when faced with new external demands, to determine whether to “bridge” (make clear links between the school’s goals and external demands) or “buffer” (find ways to protect the school from additional demands). In this way, coherence is not the sole responsibility of either schools or administrators but

rather is something that is crafted by both in ongoing discussions. While teacher leaders may not have the positional authority to buffer a school from external demands, Firestone & Martinez (2007) find that teacher leaders can serve a bridging function by personalizing the system's policy demands. Through their more personal relationships with teachers in the classroom, they are able to go beyond simply communicating and requiring compliance by engaging teachers in partnership around improvement (as referenced in Knapp et al., 2014, p. 49). Honig (2012) finds that district administrators are engaged in "strategically bridging principals to or buffering them from resources and influences outside their one-on-one assistance relationships in ways that promised to support principals' engagement in instructional leadership" (2012, p. 755). She also mentions the existence of Master Teacher Leaders in Atlanta, staff of directors assigned to work directly with teachers "to provide added support to principals" (2012, p. 755). This direct work with teachers serves a bridging role for the Master Teacher Leaders, helping these teachers translate the district's priorities in the context of the teacher's classroom. Working regularly with teachers and central office administrators, TOSAs and specialists can provide relevant information from the teachers' perspective, helping in the bridge and buffering process for policy coherence.

In considering the bridging role that teacher leaders play between administrators and teachers, Edmondson's "leadership with a small 'l'" becomes relevant. As the form of shared leadership exercised throughout an organization "and especially by those at the front lines where crucial work affecting customer experiences is carried out," leadership with a small "l" conjures up the image of the teacher leader who is responsible for translating district goals into what works for teachers in their daily practice by "developing others' skills and shaping effective processes" (Edmondson, 2012, p. 4). Edmondson holds that these small "l" leaders are forecasting the future in effective leadership: "the most successful

leaders in the future will be those who have the ability to develop the talents of others” (Edmondson, 2012, p. 285). This aspect of leadership – developing the talents of others – situates the TOSA/specialist team in a parallel role with respect to teacher development as their supervisors with respect to principal development.

Theory of Action

Choosing to examine literature on teams, central office transformation, and teacher leadership emanated from the selection of my strategic project and then substantially informed the development of the project in the context of how Bellingham Public Schools is seeking to improve student outcomes. My theory of action utilizes the characteristics of effective teams to demonstrate how district-level teacher leaders contribute to the transformation of the district office to strengthen the consistency and quality of support to its teachers:

Theory of Action: If I create the conditions for the TOSA/specialist team to become high functioning through collectively developing a meaningful common purpose, ensuring psychological safety, and engaging in interdependent tasks, then the TOSA/specialist team will serve as an effective bridge between central office administrators and teachers in schools, so teachers will be better supported in their professional learning and teaching will improve, resulting in improved outcomes for students.

For district-level teacher leaders to serve as a bridge between central office administrators and teachers in schools, they draw upon the hybrid nature of their role to work side-by-side with teachers in the classroom, as well as together with administrators in the central office, using one set of experiences to inform the efficacy of the other. Being able to do this effectively, teacher leaders need to hold multiple perspectives, seeing challenges and possibilities from the perspective of both teachers and administrators. They utilize their deep experience in the classroom and their perspective from working within

central office to engage both “problems of teaching practice and leadership practice” in search of improved outcomes for students (Knapp et al., 2014, p. 11). Thus bridging between classrooms and central office involves mediating “between district-directed reform efforts and classroom practice” (Gallucci et al., 2010, p. 920), working with schools and the district to “continuously craft or negotiate the fit between external demands and schools’ own goals and strategies” (Honig & Hatch, 2004, p. 17), personalizing the system’s policy demands for teachers (Firestone & Martinez, 2007, as cited in Knapp et al., 2014, p. 49) and leading from “the front lines where crucial work affecting customer experiences is carried out” (Edmondson, 2012, p. 4).

Thus, successful development of the individual teachers leaders into the team will be measured both by the presence of the characteristics of effective teams and, to the extent that data is available in the given timeframe, evidence of the team serving as a bridge between the central office and classrooms to improve coherence across the system in service of improve outcomes for students.

Description and Results

Take notes on the spot: a note is worth a cart-load of recollections.
- Ralph Waldo Emerson

I have integrated the evidence I collected (the “results”) into the following descriptive section because I continually filtered what I was observing, hearing, and learning about the team’s development through the five characteristics of effective teams. My evidence comes from individual and small group conversations with TOSAs, specialists, directors, principals, and other district staff who intersected with the work; meeting notes taken by administrative staff; my personal written reflections on significant events; a DTL survey of principals; and district documents. I took written notes during the several

conversations I had during my first two months to build background knowledge and develop a strategy for the team development. In January, I scheduled a handful of conversations to address specific gaps in my understanding of the history that were audio recorded and later transcribed. Throughout the year, I took notes during most in-the-moment conversations or entered a personal reflection into my note-taking system soon after the conversation. Additionally, secretaries served as note-takers during our regular TOSA/specialist team meetings and captured the major ideas in the meetings' minutes. For the majority of individuals quoted, I have used more general references to their positions and experience to respect their privacy, given that this analysis captures a snapshot in time of ongoing transformational work, and not a final review of a past project. For the members of the TOSA/specialist team, I have included a chart that gives basic characteristics for each member, which will aid in following the history and current make-up of the team (see Appendix E: TOSA/Specialist Team Characteristics). By aligning the evidence to the activities related to each of the five characteristics that framed my strategy, I believe that the story of what happened will be clearer and less redundant. The analysis of "why" the project progressed as it did will be addressed in the subsequent analysis section.

Emerging Concept of a TOSA/Specialist Team (2011-2014)

Teachers on Special Assignment and specialists have been used in Bellingham Public Schools periodically over time as a way to have expert teachers contribute to specific needs of the district, including conducting program reviews and curriculum adoptions. In 2011, the district undertook a PreK-5th grade literacy alignment and tapped two elementary classroom teachers to lead that work. According to a central office administrator from the time, this new assignment accompanied the beginning of a shift in the relationship between

schools and the central office. The previous decade had been a stretch of ‘very little centralized [professional development] happening anywhere, just every building for itself’ to identify, prioritize and provide their own professional learning. The rare professional development session organized by central office are remembered across the district as being among the worst ever experienced by teachers, their specific locations branded on the collective memory of the district: “the floor of the Sehome gym” and “the Fairhaven cafeteria.”

The TOSAs’ approach to the literacy alignment work, as described by themselves and others, was very teacher-focused, soliciting the in-the-moment needs of the teachers and continually adjusting to what they heard. The TOSAs began convening cross-district grade level meetings (Professional Learning Communities, or PLCs) to provide face-to-face support of all elementary teaches and to build up the capacity to collaborate within grade levels across the district. As their former supervisor emphasized, “of all the elementary teachers, you would be hard pressed to find more than a handful that don’t feel comfortable calling [them]. I think they feel so supported in those areas.”

While they were often commended for their transparent and timely communications with teachers, the TOSAs themselves operated in a more opaque environment within the Department of Teaching and Learning. Again, a central office administrator reflecting on work with the TOSAs during the first few years rattled off a list of questions that went unanswered: “What’s my role as a TOSA? Whom do I report to? Who sets what I work on or do I just do that? What is my relationship with the DTL, with principals, and with teachers?” The lack of clarity seemed to result in “not that many people at the district office knew what they were doing.” While this may have elicited some feeling of “that’s really cool, we get to set the direction,” the absence of explicit guidance was also interpreted, to a

degree, as a lack of support for the work being done. This fall, the TOSAs disclosed to me “in three and a half years, no one has asked us for our plan.”

This TOSA role morphed over time as other structures and personnel around it altered; while the former deputy superintendent reportedly “had time for the TOSAs on the leadership level meetings (with principals),” as the immediate urgency of the literacy adoption subsided, the two TOSAs “didn’t have as much time with directors and principals” and the work increasingly became based at individual schools, facilitating the collaboration of teachers within grade levels at schools.

During the spring of 2013, under the previous deputy superintendent, the two literacy TOSAs were asked to think through what it would look like to expand the TOSA team as a viable career pathway for teachers (see Appendix F: Proposed TOSA Team and Role Sequence). According to these two TOSAs, the deputy superintendent expected that there would be a group of between 12 and 15 TOSAs for the 2013-14 school year that they would lead. However, within a few months, the deputy was hired as superintendent in another district: “[he] left and the funding fell through. There was no clear path forward for the TOSA team.” While the substantial expansion of the TOSA team did not happen that spring (the primary hiring/assignment season), in August, two new TOSAs were hired to help lead the review of the highly capable program and a new building administrator was asked to work part-time as a POSA (principal on special assignment) to co-lead the district-wide review of the math curricula. Additionally, there was an Early Childhood Education coordinator, a Research & Assessment specialist, and two Special Education specialists whom some refer to as role-alike colleagues in the absence of a formally defined team.

Consequently, for the 2013-14 school year, there emerged a group of TOSAs and specialists based at the district’s central office but there was no explicit attention to

formalizing a structure or leadership for the group or clarifying their relationship to each other or to the DTL directors. According to the former central office administrator, “I saw this great potential. I had deep respect for [all the new individuals’] work, great respect for [existing TOSAs’] work.” But there was no effort to convene this group together as a single unit as the school year began. Even after two years in this position, the relationship between the two most veteran TOSAs and DTL directors and the rest of district office appeared unclear to the TOSAs: “We were sitting out on our own, separate from DTL, not invited to meetings.”

Despite the earlier suggestion that the two literacy TOSAs might lead the team, “no one told them, ‘it’s yours’...no one owned it.” For someone coming into the position new, the lack of structure was very hard, as made clear by the reflections of one of the TOSAs hired to conduct the highly capable program review:

I expected that I would come on board and it would be like we’re this team of people doing the work and I definitely was anticipating it would be a very close relationship. And it was not that at all last year. There were definite silos of everybody’s doing their own work and never the two shall meet. I would say that the whole transition here, because there was no team for me, was really, really hard. And I had a team, I shouldn’t say there was no team for me, there was the highly capable program team, but [we] were all new. So literally, even silly things, like it took me six months to discover there was a third bathroom, I mean silly things - nobody helped give a tour.

The former central office administrator also recognized that the “great potential” of this expanded team was left untapped: “Without somebody shepherding it and really forcing it and investing the time to get those vulnerabilities out, do that team-building stuff, it didn’t work. It just ended up separate.” The two literacy TOSAs reported that they periodically asked the DTL directors whether they themselves could call a meeting of the TOSAs and lead the team but were told that DTL was going to convene the team. This, however, did not happen: “Then it was October and we tried to set meetings but it was too hard to

schedule and in January we tried to do team building, but, by then, it was like ‘What’s the point?’” A new highly capable program TOSA remembered, “Last year we tried to have meetings but no one showed up.” Others reported that the more veteran TOSAs “would be planned and have their dates on the calendar and they would be unavailable for the TOSA team time or the PD planning time. There was an impression of inaccessibility.” By January, “things were not good.” As reported by the literacy TOSAs, the dynamic between the two highly capable program TOSAs was “quite challenging” and there was “clear evidence of friction.” Meanwhile, the Special Education TOSAs were “busy putting out fires” and not engaged with the interactions among the literacy and highly capable TOSAs.

Renewed Focus on a TOSA/Specialist Team (2014-2015)

As priorities and plans for the 2014-15 school year were finalized throughout the budget and labor negotiations processes in the spring of 2014, it became apparent that the number of TOSAs and specialists should be expanded to provide specific support for the new PreK-Algebra 2 math curriculum adoption, literacy interventions, Special Education IEP compliance, student data needs, and education technology integration. Additional expertise was needed at the district level to support the increased “opportunities for teachers and staff to learn and improve their practice” both during the new calendar’s embedded teacher workdays and in working with teachers in individual and group settings throughout the year. With these additions, the number of TOSAs and lead specialists more than doubled from 8 to 17 for the 2014-15 school year. To support the work of this expanded cadre of TOSAs and lead specialists, \$30,000 was allocated from the deputy superintendent’s budget.

During the DTL retreat on July 9, my fourth day in the district, I was presented with the idea of being the “TOSA/specialist team lead,” working closely with an executive administrator and one of the directors of teaching and learning, to lead the newly expanded TOSA/specialist team. From my own reflections that evening:

DTL Retreat - already several things listed on my line of responsibilities, which feels good. Not sure I understand all of them - and the TOSA/specialist team lead is new to me (described briefly by [DTL director] yesterday as we were leaving the office). It feels way outside my comfort zone but the opportunity to build some real knowledge and skills in teaching and learning, to be a leader of learning, is absolutely essential for my career.

During follow up conversations to understand the scope of the project, an executive administrator and DTL director identified the TOSA/specialist group as a “loose coalition” and the goal was to have them “function like a team” that would be grounded in the district’s instructional framework and use a common approach to learning-focused relationships and instructional coaching. In alignment with the ongoing transformation work within the DTL, the teaming effort should focus on “breaking down barriers between programs and activities” and establishing a “common vision around quality instruction.” These colleagues believed that helping the TOSAs and specialists to “work as a cohesive unit will contribute to supporting schools.” Some of the anticipated challenges associated with this project were also identified during these early conversations: fluid team membership due to differing job descriptions and FTE dedicated to this role; varied experience in the role; and an expressed desire by some to spend the majority of time in schools, not in central office meetings.

Asking me to lead this team was based in a couple of rationales. First, unlike most members of DTL, I was not a direct supervisor of any of the TOSAs or specialists and therefore could serve as an honest broker among all of them and with the DTL directors. Second, my experience leading other teams in the past would be an asset as we worked to

form a cohesive unit, while not having previously worked with this group would allow me to begin without being encumbered by preconceived expectations or assumptions.

Building a Research-Based Strategy

Building on the background information provided by my colleagues, individual conversations with a handful of team members who were available in July and early August, and my knowledge of the research on teams and teaming, I spent the several weeks before the scheduled launch of the team in early September developing a strategy for the team's development. I began by using the main characteristics of a team that emerged consistently from the literature on teams from organizations generally and in the education sector that focused on 1) purpose, 2) composition, 3) process, 4) support, and 5) outcomes (see Table 1 for details). I tried to keep these five characteristics in mind throughout the project as I designed meeting agendas and planned activities to address emerging needs on the team. Referencing the effective team characteristics helped me track the team's development and identify what evidence would indicate our progress toward our goals.

1) Developing a Common Purpose

Each individual had a clear job description and multiple tasks associated with the specific position for which he/she had been hired (for example, see Appendix B: Select TOSA Job Descriptions). Given the differences across the roles, our first task was to articulate a clear common purpose for our work together as a team (Katzenbach & Smith, 2005). While the top priorities enumerated in the district's Priorities for Progress outlined the purpose behind each of the 17 TOSA and specialist positions (see

Figure 2: District Priorities and Current TOSAs & **Specialists** for details), focusing on these priorities in isolation would reinforce the separate work tasks of the TOSAs and

specialists. The justification for investing resources – financial, human, and time – in developing a team is found within the collective spirit of the Bellingham Promise and the principle of learning-focused partnerships within the central office transformation literature. In an early fall message to principals entitled “TOSAs/Specialists Information,” the Deputy Superintendent situated the role of these teacher leaders within the DTL:

Most of you are aware that one of the ways the DTL is working to support high quality instruction in every classroom is through the strategy of employing Teachers on Special Assignment (TOSAs) and Specialists. These teacher leaders are working daily with students, teachers, and principals across the district to both deliver and provide support for teacher professional development and student learning...This group is tasked with helping to provide purposeful and ongoing professional development in support of our major teaching and learning initiatives....If you have particular needs at your school that would benefit from additional support in these areas, or other areas, this group is here to serve and would love to be able to target particular needs that you see...They are an INCREDIBLE resource for our district, working diligently to be the best support they can be for you, our teachers and our students. (M. Copland, personal communication, October 12, 2014)

This message set the stage for developing the team’s common purpose by drawing the clear link to the enabling conditions identified as necessary to transforming a central office in support of schools: “getting the right people in the right roles,” “clarifying the work to be done” and “continuously supporting professional learning of leaders (Honig & Copland, in Knapp et al., 2014, p. 103).

One facet of the purpose of developing these teacher leaders into a team is to have the opportunity to continue to refine and improve one’s own practice. “To develop such expertise, practitioners need opportunities to engage with others who face similar situations. Neurosurgeons, for instance, will travel long distances to operate with a colleague in order to refine their technique” (Wenger et al., 2002b, p. 9). Instead of having to travel long geographic distances, it was clear from the beginning that these teacher leaders would have to cross content barriers to become aware of the expertise and techniques of their colleagues. Between August and September, the TOSA/specialist team engaged in four full

days of professional learning together that was explicitly focused on having the opportunity to refine and improve practice. A two-day workshop on the district's instructional framework laid a foundation for discussing what good teaching and learning looks like across all content areas and all populations of learners. When asked to reflect on the "key ideas" they had gotten from the training, TOSAs and specialists focused on the instructional content that was delivered: "connections to work with adult learners" and "how to apply [instructional framework] when coaching and providing PD." However, when asked what was "most helpful" about the training, it was the process of working together that stuck out: "working with my peers and hearing their ideas," "time to engage in dialogue," and "discussion and reflection dialogue by team was well facilitated and highly valuable" (UW CEL Training, participant evaluations, August 8, 2014).

Based on the reported value of this August training from the TOSAs and specialists, a one-day follow up was scheduled for mid-January to ensure time to analyze the effectiveness of the work and respond to any emerging needs from the intervening five months. Again, the feedback echoed both support to individual work – "more applicable to my immediate tasks than even anticipated" and "totally hits my needs as a teacher and a facilitator" – and the ongoing process of team building – "I enjoyed/appreciated the job alike and across content discussion time through," "Thank you, team, for supporting our learning" and "Very rich conversation and growth towards shared understanding" (UW CEL Training, Participant evaluations, January 20, 2015).

In mid-September, I helped design another opportunity to refine our practice together in a two-day training on mentoring, coaching and leading learning-focused conversations. The key ideas that participants left the training with reflected the variety of concepts, skills, and tools introduced. Again while the content of the training was considered

valuable, many participants also reflected on the importance of having time together to tackle the hard questions. However, in evaluating what about the class was most helpful, the majority of participants cited time to practice “having real conversations with colleagues,” “in a psychologically safe environment,” “with our colleagues,” and “with authentic problems” (Mentoring Matters Training, September 8, 2014). After working with one of the TOSAs to structure the next team meeting around practicing these new skills with each other, team members voiced their appreciation of the opportunity to continue building their practice with colleagues: “Great reinforcement of last week’s learning” and “Great to have the time and space for collaboration and review of past learning was value added” (T/S Team Notes, September 22, 2014).

Another early step in developing our common purpose was sharing our hopes and fears for the year at a team meeting in September (see Table 2: Hopes and Fears). Although I had been thinking about the purpose of the team since the project was first proposed to me two months earlier, I understood from the Communities of Practice work that the process of developing a common purpose would be one of negotiation:

You cannot act unilaterally...with a community, your power is always mediated by the community’s own pursuit of its interest. You cannot violate the natural developmental processes and dynamics that make a community function as a source of knowledge and arbiter of expertise, including members’ passion about the topic, the sense of spirit and identify of the community, and its definition of what constitutes expert performance. (Wenger et al., 2002b, p. 14)

While this exercise provided a good opportunity to learn more about the members of the team, its deeper purpose was to surface and then create group ownership for each other’s expectations and concerns as a foundation for the teamwork we were seeking.

Table 2: Hopes and Fears

We hope...	We fear...
<ul style="list-style-type: none">– coordinate our work with schools, through visit schedules, emails, common language;– kids do better as a direct result of our work;– become an interdependent team working well across the whole system;– our time working together is acknowledged and understood as part of our job;– we help build sustainable, district-wide systems that last beyond us;– build a system that is transparent and sustainable;– contribute to the transformation of breaking down silos within central services.	<ul style="list-style-type: none">– getting too busy for collaboration;– not everyone in this group is a “TOSA” (some are school-based specialists);– we will not have a real impact on kids;– this role/team is not a real leverage point to affect change;– not meeting the real needs of students and teachers;– being out of our comfort zones and not knowing all the answers;– barriers to implementation will seem to outweigh the benefits.

I envisioned that this collective list would serve as a touchstone for our work throughout the year and a way to hold us accountable to what we had set out to accomplish. As we continued to meet on a regular basis (averaging between two and three 75-minute meetings per month), the desire to coordinate and work together came up regularly in our conversations. At our October 20 meeting focused on homing in on a common purpose based on being eight weeks into the school year, team members were asked to brainstorm what individual work they would like to share with the team, what district-wide issues they would like to address as a team, and what other topics they would like to investigate and process together as a team. As individuals shared specific activities that could be part of the team’s work, several common words linked the activities together: collaboration, communication, coherency, and consistency and one member summed up the impetus behind developing the team: “The more we can co-exist, the more efficient we will be for teachers.” Even the process of sharing these ideas seemed to ignite a sense of teaming among the attendees. In the closing statements for the meeting, two members reflected on the change from the previous year: “Last year it felt like we were all working in isolation; this

year is so positive and I feel blessed to be part of the team” and “Thank you, Anda, for taking on this group. It is such a vast improvement from last year. There has been a huge shift and we are already working together on things that we would not have if this group was not in place” (T/S Team Meeting Notes, October 20, 2014).

Continuing to work on articulating a common purpose among the members of the teacher, I chose to begin the following week’s meeting with a “text rendering protocol” on a poem by Margaret Wheatley entitled “Turning to One Another” (see Appendix G: Turning to One Another). After reading the text individually, each person selected lines and phrases that resonated with them. The ensuing discussion around such statements as “Know that creative solutions come from new connections” and “Invite in everybody who cares to work on what’s possible” elicited questions like “How does everyone here do their work?” and revelations like “I love the conversations around the work and problem solving together. That’s why I am here.” One person then referenced the need for a stronger connection to the DTL directors, upon understanding that the directors had drafted a theory of action of which the TOSA/specialist team was unaware. Plans to develop a TOSA/specialist team theory of action were then put into motion and formally undertaken in early December. Participants’ closing statements for that October meeting included “I like the feeling of the group’s increasing openness and honesty,” “I wish we had more time together as a group to collaborate with each other,” and “What if we figured out how to do this really, really well?” (T/S Team Meeting Notes, October 27, 2014).

After much negotiation about the date (which will be described in more detail in the “Process” section below), we scheduled an extended team meeting for December 1 to have time dedicated to the theory of action development process. After a presentation by an executive administrator and a DTL director on the process and value, team members had the

opportunity to draft individual theories of action and then work together in small groups to develop a theory of action that applied to the work of the team (see Appendix H: TOSA/Specialist Team Theory of Action Drafts). At the end of that half-day session, there was a mix of responses on the progress toward developing a common purpose. For some, there was hope in what might be possible: “I used to think each TOSA pair identified and served specific needs in their area of specialty, separate from the work of others. Now I think we need to be more communicative and intentional about our work as a team” and “I used to think changing an organization this large was nearly impossible, but now I think it is doable.” For others, there was some uncertainty as to whether the team would be able to accomplish the task: “I wonder if we will continue to work ambitiously toward articulation of our group purpose” and “I wonder if we will design a model that has clarity around our collective work.” Finally, some participants were still searching for more clarity of purpose within the existing system, reflected in their written responses to the prompt, “What I still wish I knew”:

- Where we are going, what is the work of the team;
- The vision of DTL in regards to the TOSA team and teacher leadership;
- Is imagining a new system for professional learning really on the table? How serious are we about truly designing PD systems with teacher voice at the center? Priority or simply a task?
- How to define our collective areas of work in support of each other’s work; and
- I wish my team members knew that we’re all in this together. Feeling like we are still siloed. (T/S Team Meeting Notes, December 1, 2014)

Following another small group work session and subsequent group discussion, the team’s draft theory of action read:

If we, the TOSA/Specialist team, provide differentiated support based on identified and prioritized professional learning needs, then teachers will be empowered to refine their practice, resulting in increased learning and social development for all students, as envisioned in the Bellingham Promise.

Another discussion during a late January meeting inserted two words that sought to shift this theory of action from one that could be enacted individually to one that required the team:

If we, the TOSA/Specialist team, *collaborate to* provide differentiated support based on identified and prioritized professional learning needs, then teachers will be empowered to refine their practice, resulting in increased learning and social development for all students, as envisioned in the Bellingham Promise (emphasis added).

As the timeline for collecting evidence for this capstone came to a close, the TOSA/specialist team was analyzing how well they had collaborated together to provide strong support and were particularly focused on how their ability to help teachers refine their practice felt mitigated by the sheer number of new initiatives being directed at teachers.

2) Team Composition – Membership, Relationships & Leadership

Attention to the composition of team – its members, their relationships, and its leadership – is found in Hackman’s “stable team,” Katzenbach & Smith’s “mix of complementary skills,” DuFour’s “responsibilities create an inherent mutual interest,” and Wenger’s “self-selection based on expertise or passion for a topic.” While the TOSAs and specialists were all hired with similar titles, each new position was developed in response to a particular teaching and learning initiative, not explicitly as a means to grow a team of district-level teacher leaders. So the composition of the possible team was set before the notion of the team was formalized. In an effort to be inclusive and because I lacked the context-specific knowledge of how the individuals or roles were different, I invited all eleven TOSAs and six lead specialists (representing larger groups of specialists working in specific schools) to be part of the team. For the 4 TOSAs and specialists for whom that role was part-time, their supervisors (who had fought hard during the budget hearings for these positions to address pressing issues like individual education plan (IEP) compliance for special education and improved literacy interventions) advocated for allowing their TOSAs’ participation to be

optional. They held that allocating dedicated time to the team would take time away from the work that had spurred the creation of their district-level roles in the first place (for an example, see Appendix I: Special Education Specialist (TOSA) Job Description). In these cases, the TOSAs asked to be able to opt-in to specific activities (including targeted professional learning opportunities) but indicated that, due to their existing teaching schedules, they would not plan on attending the regular meetings. Therefore, as we began to meet regularly in early September, there were 13 TOSAs and specialists who were expected to be regular participants in the team activities.

In the beginning, relationships among the members of the team were influenced by a number of factors. The most apparent relationships were within content areas, with all but one having a job-alike colleague with whom to collaborate. For some, this was a work relationship that had been in existence for at least a couple of years; for others, it was a new colleague but someone with whom they shared a specific area of focus and expertise. Other collegial relationships existed across content areas, grounded in years of working together in the district and region. In my entry conversations, I became aware of the dynamics that had emerged during the previous school year. Several members voiced admiration for the two longest-serving TOSAs and a desire to work with and learn from them. Several members had recently completed or were part of administrator programs, both formal education and credentialing programs and a district-sponsored “Aspiring Administrators” program. In individual conversations with me, some team members mentioned that they knew others would likely be applying for the same principal openings in the spring, signaling nervousness about competition that might arise within the team.

As we continued to meet together regularly, the distinct approaches that individuals had toward the work became more apparent. In their study of knowledge management,

Leonard and Straus assert “the manager successful at fostering innovation figures out how to get different approaches to grate against each other in a productive process we call *creative abrasion*” (Leonard & Straus, 1991, p. 111). While these different preferences are not completely rigid, the authors also found that when managers use credible instruments with employees to reveal those preferences (like the Myers-Briggs Type Indicator), then their employees accept the outcomes of the tests and use them to improve their processes and behaviors” (Leonard & Straus, 1991, p. 115). I introduced a self-diagnostic “Compass Points” tool in an early November meeting to begin the conversation about how different work style preferences existed within our team. After discussing what each style wanted others to know so they could work together effectively and what was valuable about the other styles, one member summed up that “we need every approach in order to function well. Awareness of everyone’s preferred style can help us work together more effectively and efficiently” (T/S Team Meeting Notes, November 3, 2014).

To support the development of our skills in working across lines of difference, I then organized a full-day session with a trained facilitator on the Insights Discovery Profile, which uses a preference evaluator based on Carl Jung’s work on personality to generate individual profiles for self-understanding and development. “Every advance, every conceptual achievement of mankind, has been connected with an advance in self-awareness” (Jung, 1948). The session was geared toward uncovering assumptions and perceptions about preferences, understanding the make-up of our team across the different preferences, and using that information to support our team’s growth. Upon seeing how the members of our team were arrayed across seven of the eight the dominant preferences on the “Insights Team Wheel” (see Appendix J: Insights Discovery Team Wheel), one person remarked that “it begs for a conversation for revising how we do the work together” since there would be no

perfect approach that would meet everyone's preferred style. Another said that this information led her to ask herself, "What if I put more of my energy into collaborating with this team?" because the team together clearly had more strengths than any one individual (T/S Team Training, January 5, 2015).

When I began working with the team, I wondered if my formal leadership of the team would be impacted by the informal leadership that could be exercised by the more veteran TOSAs. As stated above, within the first week of my arrival to BPS, the opportunity to lead the development of the TOSA/specialist team was proposed. Although I perceived that I had relatively less experience than my new colleagues in the on-the-ground work of teaching and learning, one of the justifications for having me lead the team was that I entered the environment as an objective outsider. Given the relatively undefined relationship between TOSAs and the DTL and the tensions that existed among some TOSAs the previous year, having someone without any prior connections to the work and the relationships was seen as a benefit. Additionally, different DTL directors supervised anywhere from 1 to 5 of the teacher leaders. Without supervisory or evaluation responsibilities for any of the individuals, I would be better able to maintain an objective stance and create a psychologically safe environment within which to carry out our work.

Since I was asked to facilitate the team by an executive administrator, I was seen as the formal team leader. However, given my recent arrival to the district and the fact that the majority of my professional background was in research and policy (rather than teaching), I sought to maintain an inquiry stance throughout the team development process. I had conducted background conversations with several of the team members and had a sense of the history and expectations of those individuals, but I could not presume to have a complete understanding of what this team would need as we began our work together. In

conceiving of my role as the leader of this team, Wenger's work on Communities of Practice provided a helpful reference point. They are led by Community Coordinators, who help "the community focus on its domain, maintain relationships, and develop its practice." Wenger and his colleagues assert that, typically, effective community leaders are "well respected by their peers as practitioners, but they are generally not leading experts in their field. Since a coordinator's primary role is to link people, not give answers, being a leading expert can be a handicap" (Wenger, McDermott, & Snyder, 2002a, p. 81). In the areas of teaching and learning and instructional coaching, I was certainly not the leading expert in this group and therefore would be able to focus on setting the direction. Moreover, this project aligned closely with my personal leadership goal related to learning about instructional leadership at the district and school levels, so I was, as Wenger describes, "keen to help develop the community's practice...and personally interested in community leadership" (2002a, pp. 80–1). However, Wenger et al. also assert that good community leaders are "well connected to other community members (they know who's who in the community)," which I certainly could not have been from the beginning of this role. Over time, my own multiple memberships – on the executive team, on the DTL, and on a joint district-teachers' association committee on professional development – helped me make connections between people and ideas that may not have been made in my absence. These included advocating for the TOSA/specialist team in DTL meetings and utilizing evidence gathered by the team in the PD committee. As one former central office administrator reflected, "I think I tried to be the liaison, bridging [the TOSAs'] work, making sure it was still on the table at DTL. I realize now that wasn't enough for them. It didn't feel integral to everything else." With facilitating this team as a named part of my role with the district, my ability to keep the work of the TOSA/specialist team as part of other conversations may have been improved.

As referenced in the recent history of the TOSA/specialist team section above, the two most veteran members of the team had been involved in earlier work to sketch out the development of a more robust TOSA team and career pathway that had not come to fruition (see Appendix F: Proposed TOSA Team and Role Sequence). Their work as full-time TOSAs over the preceding three years was well known throughout the district and it was clear that other team members regarded them as models for the role. As one new TOSA explained, “At the elementary level, it will be important to hook things with [them] to support teachers more holistically,” while another saw her role as doing “similar work that [they] have been doing in literacy.” In this way, they may have initially been considered informal leaders of the team. However, their irregular attendance at early team meetings (explained in more detail in the following process section) reduced the initial opportunities to exercise this leadership in the context of the whole team.

3) Process – Strong Commitment to How the Work Gets Done

In addition to developing our common purpose and understanding the composition of the team, we needed to voice our shared expectations around the ways that we would work together. Setting team norms to guide our work with each other was an important early step during the team formation stage. That the concept of the team was formalized *after* the members of the team had been contracted into their positions as TOSAs and specialists and that these positions varied in their specific responsibilities and FTE made having these team agreements even more important. From the beginning, I could anticipate challenges both around finding common time to undertake collective work and balancing the personalities within the team. I envisioned that team norms would be useful to surfacing and discussing incidents related to participation and personalities. As I designed our first official meeting, I solicited feedback from the TOSAs and specialists themselves on my draft

plan. Based on their email responses, this early focus on norms resonated with team members:

I think norms are essential, so it sounds like you've got a good plan for our first team day.

2nd year TOSA

Probably goes without say [sic] but I think developing group norms is very important. I value meeting time that is efficiently run. I think it's important to make sure we're all on the same page with that. Staying on task and using time equally are two biggies for me.

1st year TOSA

In terms of norms, I believe I will find this team most beneficial and productive if we have an expectation that we will question and challenge each other and have open discussions about different opinions or perspectives within the intent of learning and providing the most effective knowledge and resources to our teachers.

4th year Specialist

Incorporating these suggestions, at our first meeting, I leveraged individuals' past experiences working on teams to generate specific norms that would be appropriate for this team and its work this year. Before our second meeting, I combined the 34 suggestions into 12 norms that could be categorized into three over-arching statements that we could more easily recall: "We commit to building trusting relationships, working collaboratively, and bringing our whole selves" (see Appendix K: TOSA/Specialist Team Norms of Agreement). After discussion and agreement to these norms as a team, I began the practice of placing copies of these norms on the table at every meeting and include the summarized version on all meeting agendas and notes.

As I became more familiar with the individuals on the team, I discovered that my own skills as a facilitator would be an important aspect of how this team developed. I was working with individuals who spent much of their time facilitating small and large group learning. In my previous work, group facilitation had received little emphasis and rare accolades. I needed to research, observe and practice my facilitation skills. Although my

first inclination is always to consult the research, I quickly found that I had, within my team, the expertise I needed to improve my own skills. With the dual purpose of providing feedback to individual TOSAs and specialists and observing good facilitation in action, I began to attend district-wide PLCs, staff meetings, and other professional development offerings being delivered by my colleagues.

At the same time, I also learned that my natural approach to group facilitation was welcomed in this group. Cueing in on what Knight calls “partnership facilitation,” I immediately took to the image he quotes from author and productivity consultant David Allen: “Imagine throwing a pebble into a still pond. How does the water respond? The answer is totally appropriately to the force and mass of the input; then it returns to calm. It doesn’t overreact or under react” (David Allen, as quoted by Knight, 2007, p. 185). Building on this image, Knight holds that partnership facilitators “must have minds like water. They must be ready to process whatever comes their way, be quick to intervene as much or as little as is necessary to keep the ball rolling, and retreat from intervening as soon as possible” (Knight, 2007, p. 185). Members of my team recognized this tendency not to overact at our first meeting; from my own reflections that evening:

As I walked into our Tch Teams training this morning, a couple of the TOSA/Specialists thanked me again for our time together yesterday. [One] mentioned how much she appreciated my facilitation style, to which [another] agreed. From the next table over, [a third] said, “Calming? Yes, that’s what I would say. You have a very calming presence.” While I sometimes struggle with showing my enthusiasm and excitement for things because I process so much internally, I appreciate when that more subdued way of being is appreciated, rather than seen as a deficit.

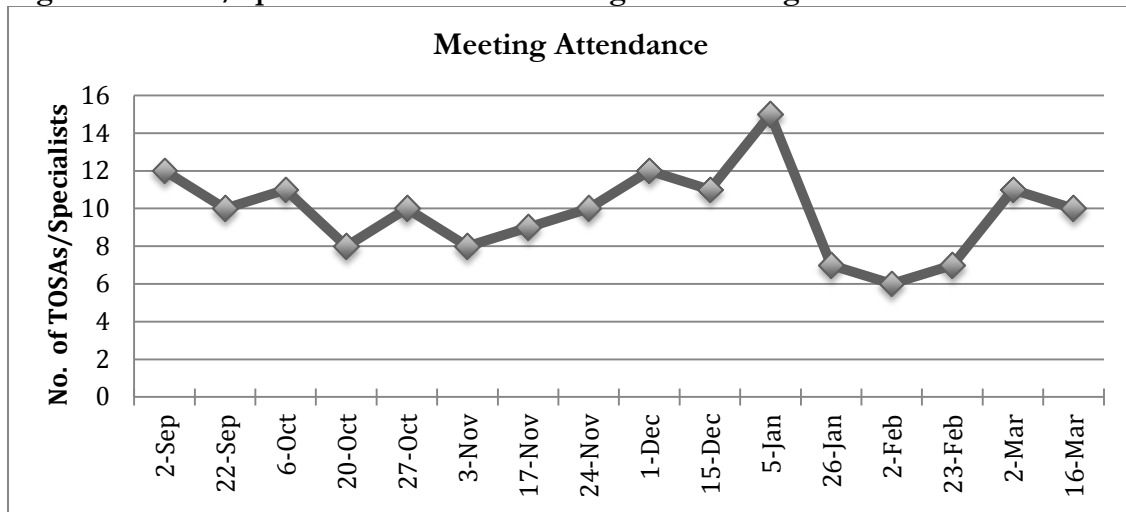
In considering my ongoing facilitation of the team meetings, I considered how to strike the appropriate loose-tight balance, what DuFour calls for “being flexible on implementation but firm on the essence of the initiative” (2006, p. 194). I saw my role as holding tight on the norms we had established and the hopes we had collectively shared. Not being the team’s expert on instructional leadership, I needed to be willing to listen and adapt. While

“being flexible” on what we would end up with in terms of the implementation of our team’s work, it was my role to hold the time sacred to enable the good work to occur. As part of the feedback for our October 20 meeting, one member asked that, given the challenge of the work ahead, we all continue to come to the meetings engaged and interested in participating by starting on time and consistently being present (T/S Team Meeting, October 20, 2015).

At the next meeting, I facilitated a conversation around the expectations we had of each other: What had we explicitly or implicitly committed to each other when we “signed” on to this team in August? Where were the boundaries of that commitment? And what were we holding tightly and what were we loose on? The conversation emanated from an emerging consensus that the team had important issues to discuss and debate, and yet we lacked consistent attendance by all team members (see Figure 3: TOSA/Specialist Attendance at Regular Meetings). In particular, one or both of the two most veteran TOSAs was absent from 4 of the first 6 meetings or trainings in September and October. While the reasons for the absences varied from family emergencies to already-scheduled commitments, the overall impact of their collective absence appeared to cause the rest of the team to question their commitment to the group and, consequently, the group’s overall purpose. While they may have been the focus of initial discussions around commitment, they were not the only ones to miss meetings. Some of the gaps in attendance may have been a result of prioritizing other commitments over the team. However, the multiple demands on the TOSAs’ and Specialists’ time – supporting teachers across up to 22 schools plus the additional leadership roles these members had been tapped for both in the district and in the region – meant that sometimes the team meeting would have to be a secondary priority. Thus, even when the commitment to team development was high across the whole team, it

was still hard to ensure that everyone would be in attendance and some of the momentum would break anyway. (Note that as stated earlier, while the entire team included 17 members, we collectively expected attendance at the regular meeting by the 13 full-time TOSAs and specialists.)

Figure 3: TOSA/Specialist Attendance at Regular Meetings



Note: Regularly scheduled meetings on 1-Dec (theory of action drafting) and 5-Jan (Insights training) were turned into extended trainings explicitly advertised as team-building times.

We discussed the agreed-upon time for our meetings (7:30-8:45am) and the commitment made to attend these meetings. One of the literacy TOSAs drew on her prior years in the role, implying that the 7:30am start time was too late, saying, “Our policy has been that if teachers and students are in schools, we are in schools. That is where our work gets done.” That afternoon, I reflected on what I said to the group to convey one of the balancing acts that I saw needed to happen when thinking at a systems level:

Imagine the extra half hour you spend here, working with your colleagues who themselves are out in schools with students and teachers during the rest of the week. In that half hour, you have the opportunity to shape the ideas and practices of 10 to 12 of your colleagues, and in turn be shaped by their perspectives. The number of teachers and students that are impacted by this collective group is tenfold of what it was when you were working in isolation.

Team participation in our regular Monday morning meetings appeared to respond to this discussion as the overall attendance and particularly the frequency of attendance by those who had been absent more during the first two months increased from November and December.

However, scheduling remained a continual challenge. As we collectively determined that we needed an extended time to develop a team theory of action, I sent around a quick survey to find the best possible date that all or at least a majority of the regularly attending members could work into their existing schedule. Not one of the nine proposed dates elicited a response of more than half of the team that it was “best date(s) for me,” although several dates were workable within specific timeframes for each individual (see Appendix I: Extended Time Survey Results).

In addition to traversing new team processes, each of the TOSAs and specialists were navigating through ways of working with the broader community of teachers across all schools. In the October communication from the Deputy Superintendent to principals about the TOSA/specialist team resource, he wrote:

Those of you in the elementary schools are probably well aware of the outstanding TOSA support that has been available over the past few years in Bellingham. For those of you in the middle and high schools, these folks may be a new resource... When you see these folks out in your schools, I encourage you to reach out, connect, make them feel welcome, and if you are not familiar with their work, get to know them and what they can bring in terms of assistance. (M. Copland, personal communication, October 12, 2014)

This communication reveals one of the core challenges that district-level teacher leaders face in engaging in their work at the school level. While teacher leaders who are based at a particular school are likely to have professional relationships with the other teachers in their school upon which to build in their new leadership role, teacher leaders coming from the district office and expected to work across all the schools in the district cannot rely simply

upon past collegial relationships to build that trust with colleagues. As with the process of developing trust within the team, it takes time and cannot be flipped on by a single professional learning experience: it is a “shared sense developed through shared experience” (Edmondson, 2012, p. 137). One TOSA said that one of the challenges of the role “is that I stepped out of the classroom after 3 years in Bellingham and nobody knew me. I would just show up at a school and they had no idea who I was. So I felt like I spent most of last year just building credibility...I had to build a reputation.”

In addition to the challenge of adjusting from working with the dozens of teachers in one’s own school to working with hundreds of teachers across the district, district-level teacher leaders face an additional credibility challenge. While these teacher leaders are seeking to bridge the gap between schools and district office, classroom teachers may perceive anyone, even teachers, coming from district office as someone who is bringing new demands or constraints or is searching for information to bring back to central office. Smylie & Denny’s findings around “role ambiguity” suggest that transitions within the workplace are impacted not only by an individual’s action but by the “socialization cues and constraints associated with the organizational contexts in which these roles are to be developed and performed” (Smylie & Denny, 1990, p. 256). Attention to the structuring of roles should be coupled with attention the organizational culture. As one former TOSA remembered, “My first year was okay but by the second year, if I went into the school staff room to have lunch with colleagues, they would act like I was a spy from central office.” While each new TOSA and specialist had to navigate this individually in his/her day-to-day interactions with teachers and schools, the existence of the team positively impacted this credibility. Where some individuals had had positive experiences working with particular schools, grade levels or teachers, it seemed easier for other TOSA/specialists to make

inroads there; conversely, where the support from a particular TOSA/specialist had not been well-received, it was more difficult for others to even offer support. In this way, having a coherent and proven approach to supporting teachers and schools began to help build the credibility of the team writ large and potentially increase the overall effectiveness of individual TOSAs and specialists in their individual content-specific work.

Developing that coherent approach was an important component of the work the team undertook together. Beginning with the instructional framework training in August, the team engaged with forms of the inquiry cycle and design process associated with taking an inquiry stance, gathering data by suspending judgment and asking open, honest questions, analyzing that data, and developing and testing theories (Fink & Markholt, 2011, p. 230). Using the inquiry process in our collective work stretched members of the team by asking them to put aside their existing beliefs and assumptions to engage in an authentic “noticing and wondering” process – an approach we learned from our beginning-of-the-year instructional framework training on how to observe in classrooms without judgment – around the challenges the system faced. Some of those who were new to their position expressed frustration that we weren’t yet “doing” as a team. I held that establishing a common understanding of what we were trying to accomplish as a team was necessary before we moved into doing collective work together – a “go slow to go fast” approach. While each of the teacher leaders were actively involved in schools as they carried out the responsibilities outlined in their job descriptions, they did not see their collective work having an impact outside the confines of our meetings. However, I held the responsibility of liaising between the team and the DTL directors, using the discussions among the TOSAs and specialists to help inform directors’ conversations and vice versa. This was a less visible

form of “doing” that may be harder for teachers who are used to seeing impact on a daily basis in their classrooms to recognize and quantify.

Part of developing a strong commitment to how the work gets done required an understanding that members of effective teams rely upon one another to accomplish goals that are not achievable alone. The importance of having interdependent tasks is present throughout the leading research on teams, from the universal characteristics of effective teams from Katzenbach and Hackman to the sector-specific professional teams outlined by DuFour and Wenger. To help busy, expert practitioners have the time to recognize how others on the team might be helpful and even essential partners in their work, I opened every meeting with a prompt for sharing with each other. In the beginning, these prompts varied weekly, including sharing highs and lows from the week, acknowledging someone else on the team’s work, or asking colleagues for assistance with a specific project began to produce a web of connections across the individuals. I discovered that regularly using the more general prompt of “Celebrations and Acknowledgments” allowed for a sense of consistency from meeting to meeting and still enabled individuals to share both professional and personal stories that would contribute to our knowledge and understanding of each other and their work. High points from the week increasingly started to include other team members’ names and aspirations for the team included wishes for more time together as a group to collaborate with each other, continuing to fortify the strands of the web with every meeting. That web was not completely symmetrical; some connections grew much tighter over the course of the school year while others remained fragile with only a thin string of connection between them. Some of the strongest connections were clearly linked by content, students and teachers served, and type of work being done. However, personalities, time in the role, and accessibility also seemed to contribute to the density of

these connections. In particular, there appeared to be a divide between the veteran and new members. The veteran TOSAs themselves recognized this, citing their absence from a district-wide forum for individuals to publicly acknowledge each other that included several mentions of TOSAs recognizing each other. Additionally, many of those who shared a common office space and were there regularly during the workweek appeared more likely to be collaborating and working with each other. As one returning member reflected, “One of the reasons [the team is] working better this year is because many of us are in [room] 208. Having us physically together helps.”

From the perspective of the team as a whole, interdependent tasks that addressed real-time problems individual team members were facing in their daily work received the most attention. Coming together regularly and sharing experiences and perspectives led to collective work happening by smaller groups within the team. One member reflected at an October meeting that he “likes the problem-solving aspect and the idea of bringing a problem to help solve with the group as well as learn about each other’s jobs and share resources” (I/S Team Meeting Notes, October 20, 2014).

Early on, team members expressed a desire to coordinate the communication forms being used with teachers and to develop and utilize a coherent knowledge management system to more effectively support teachers. In late October, two of the new TOSAs sent an email to the team to set up a meeting for anyone interested in:

- 1) ways to improve communication with teachers (is e-mail the best way?) and 2) where to save documents so that teachers can access them easily. We thought ‘if we have this problem, everyone else must have it, too!’ Or maybe you have a special secret way of doing these things you’d like to share with us all.

Tackling knowledge management is an aspect of the work carried out by Communities of Practice, which “do not reduce knowledge to an object. They make it an integral part of

their activities and interactions, and they serve as a living repository for that knowledge” (Wenger et al., 2002b, p. 9).

By December, the district-wide grade-level PLCs that had been developed and used by the literacy TOSAs in previous years became a vehicle for delivering important information about education technology integration that would help prepare teachers for administering the new standardized tests in the spring. At an optional planning meeting for the PLCs that was scheduled to follow a regular TOSA/specialist team meeting, the members present decided to show their support as a unit to the teachers facing these new challenges by attending as many of the upcoming PLCs as their individual schedules would allow. In a follow up message “PLC Thank You” to the team, the literacy TOSAs wrote:

Dear Team, Thank you so much for your gifts of time to our colleagues during this round of PLCs. It was so great to see “reinforcements” arrive to provide support to teachers as they learned about the Smarter Balanced Assessment.... Looking forward to our continued collaboration in support of teachers and their learning toward Smarter Balanced Assessment.

This new team-based orientation toward the work was also beginning to be recognized externally. Upon observing one of these PLCs, one of the directors said to me, “You should be a proud mama!” as she reported on watching the TOSA/specialist team working together as they worked with teachers. She noted that one of the TOSAs emphasized to the teachers “the TOSAs and Specialist may have different approaches to their individual work with teachers but we are working together.” Increasingly in discussions within the district office, I was asked, “What does the TOSA team think?” an inquiry that reflected both the interest in the work of the teacher leaders and the value of the collective perspective. “What the TOSAs thought” now represented aggregated experiences from across content areas, student populations, teachers, and schools that could not have been easily accessed in prior years. The collective perspective seemed to be taken more seriously when making decisions,

since they could no longer be written off as just one person's opinion. Including the team in analyzing work and making decisions became a regular part of how new ideas were vetted within the district office, including, for example, the guiding principles for professional learning developed by a joint district-union committee and the drafted revisions to the new professional learning opportunities for 2015-16. In March, one elementary principal offered her perspective on the TOSA/Specialists' work this year: "I sense that there is much more of a service learning focus from the TOSAs in their support of teachers this year. I guess I didn't think about what had caused that change but I think it might be coming from them working together at (the district office)."

At the same time, the team began to engage deeply in questions around effective professional development. Embedded in the discussions around how individuals, pairs, and the whole team were working with teachers in schools was an ongoing debate about the characteristics of effective professional development. TOSAs and specialists were involved in professional development in multiple ways, including identifying, designing, and delivering teacher-requested, program-specific, building-based and district-wide professional development. TOSAs and specialists have been identified as "well-trained teachers" as a result of being hired as TOSAs and specialists and are used regularly by principals to "model and support staff learning" at schools. As teacher leaders with this close link to district office, TOSAs and specialists support staff learning not only while delivering professional development to teachers, but by being part of the planning, evaluation, and redesigning of professional development happening at the district level.

As a member of the multiple teams within the district office, I had access to ongoing conversations that were all tackling the question of how to make our professional learning system more effective. While central office administrators depended on the TOSAs and

specialists to be the bridge to teachers, classrooms, and schools, over time I learned that they needed me to be the bridge to the directors. While it may seem obvious in reading this account that I would act as this connector across two of the groups in which I had membership, in the beginning I struggled to define my role with respect to the TOSAs/specialists and the directors. I initially assumed that information was being transferred to individual TOSAs and specialists via their content-aligned supervisors and that my contributions would be redundant.

However, in November, I sensed that the TOSA/specialist team as a whole needed to have more explicit connections to the directors and I worked with the Deputy Superintendent to identify where the team could help inform the directors' work. As both teams were wrestling with aspects of the professional learning system, we invited the team to join DTL's "strategic meeting" to begin planning for the 2015-16 school year. The Deputy Superintendent reiterated the valuable perspective the team would bring to the conversation:

TOSA/Specialist Team,

Wanted to reach out and invite you to participate next Monday morning in the December DTL strategic meeting. During this meeting the DTL directors will be engaging in conversations about two closely-related topics that would greatly benefit from your voices in the room. These topics are:

1. Conversation about professional development priorities to guide our decision-making moving forward. Answering questions like -- What PD is mandatory for ALL? What PD is recommended but optional? What specialized PD might be offered in a voluntary way for fewer?
2. Initial planning conversation about the BSD PD calendar for July-August 2015 and 2015-16 Purple PD days, to get us started thinking about priorities for what will be a tight summer given the calendar shifts, and how to use that time as well as available time during the school year.

We will meet in Room 212. Please come if you can, and if the spirit moves you. This is NOT a mandatory meeting, but I would strongly encourage you to make time if possible, and even if you can only donate part of your morning on Dec 8. We are scheduled to meet from 8:30-11:30 am. Your input is important and welcomed.

Thanks for all you do. (M. Copland, personal communication, December 1, 2014)

Ten TOSAs and specialists were able to participate in the strategic meeting and throughout the three-hour conversation, team members referenced their direct connection to teachers in classrooms, shared perspectives that came out of the team's earlier professional development discussions, and advocated for the voice of teachers to be included in this design process. In discussing how to frame an upcoming set of grade-level professional development sessions, one member began by saying, "Knowing the personalities of the grade levels..." before suggesting that each grade-level introduction be tailored to that specific group. Discussion about how teachers were reacting negatively to district-directed professional development led one member to preface her comments in support of the teachers' perspective by saying, "Maybe I am just being protective of my colleagues, so understand that as I say this...". While taking the perspective of the teachers, this member then pivoted to the challenge of being in a district-level leadership role and providing professional development to the teachers: "We are three years into this and have been setting the culture and building the trust." In considering how to evaluate if professional development is actually impacting teachers' practice, another member suggested refining the feedback being requested from teachers: "Maybe we should include that in our survey to teachers after we offer PD: What do you need in order to go back and implement this?" (DTL Strategic Meeting Notes, December 8, 2014). As a collective, their consistent advocacy for how to better support the growth of their colleagues in classrooms echoed Amy Edmondson's "little l" leadership where the focus of leadership going forward is on how they develop others.

As an interdependent task, the redesign of the professional learning system reflects DuFour et al.'s (2006) findings that "responsibilities create an inherent mutual interest" and individuals "rely upon/need one another to accomplish goals that are not achievable alone." These inherent mutual interests extend beyond the TOSA/specialist team itself, connecting

the work directly to the broader purpose of the DTL. Follow up tasks that emerged from this strategic meeting included one TOSA putting on the hat of a teacher at each grade level and expressing what professional learning plan would look and feel like to him as a new kindergarten teacher, as an experienced 5th grade teacher.

As the scope of the team's possible work together grew through discussions of what needed to be improved, I heard occasionally from members that establishing trust, developing a common purpose, and aligning practices in support of teachers could not be accomplished in the time allotted each week. As I developed our meeting agendas, I recognized that our short and sometimes irregular weekly meetings seemed to constrain progress toward engaging effectively, and in a sustained manner, in team-wide interdependent tasks. Returning to DuFour's work with PLCs, I remembered the guidance of not letting 'lack of time' get in the way of process: "One of the most common small wounds inflicted on a PLC initiative occurs with protestation of the lack of time to implement PLC concepts.... the process does take time...but leaders cannot accept scarcity of time as justification of not moving forward" (DuFour et al., 2006, p. 195).

To make the best use of our limited time together, I drew from the research on designing time-efficient and effective meetings by Garmson & Wellman (2009) and Knight (2007). For example, as mentioned above, I regularly utilized "*starters*" like "Celebrations and Acknowledgements" for our early Monday morning meetings to help the team to transition "physically, socially, cognitively, and emotionally into the work space and topic" (Garmston & Wellman, 2009, p. 78) and "*structures*" like "clearly organized handouts" and "high quality materials" with respect to agendas, meeting notes, and email updates to communicate that I "genuinely care about my team members" (Knight, 2007, p. 188) (see Appendix M: Sample TOSA/Specialist Team Meeting Agenda).

When we had the good fortune to have three weeks in a row with a team meeting, I endeavored to identify a connected sequence of activities that would help to build momentum for our collective work. However, while I could be assured that the meetings would run for those three weeks, I could rarely be sure that all, or even the majority, of team members would similarly be available for that series of meetings. Early on, I was encouraged by team members to push forward with plans, even when attendance was lower, to maintain the group's momentum and to respect the time and expertise of those who had committed themselves to being there. This authorization to press on helped me again when our attendance dipped in February, when the ELL specialists missed the entire month to administer required testing of students and our Math TOSAs were away serving as regional district fellows, which together notably affected attendance that month (see Figure 3: TOSA/Specialist Attendance at Regular Meetings).

4) Support – Mutual Accountability and External Structures & Processes

The research finds that effective teams have structures within and around that support their creation, their work and their success. Therefore, in my effort to ensure this team was supported in its work, there were both actions I took and actions taken by others external to the team that contributed to the overall support of the team. Katzenbach & Smith (2005) emphasize having a system of mutual accountability within the team, which we worked to instill through setting and regularly revisiting our norms. Meanwhile, Hackman (2002) identifies “an enabling team structure.” One of the early technical supports I added was to have secretaries taking notes during our meetings. Having this administrative support increased the quality and consistency of the records of our activities, which helped us track our own progress and, in particular, keep those members who missed a meeting abreast of the most recent developments. The value of these notes was captured in an email from one

of the part-time TOSAs whose teaching scheduled precluded her from regular meeting participation: “We really appreciate your time keeping us in the loop and the notes from the TOSA meetings are very helpful in understanding the conversations that are happening within the team.”

In the case of this project, an enabling team structure was also going to be one where the members of the team felt safe to share their challenges and their successes. While I continued to reference Edmondson’s list of “leadership behaviors for cultivating psychological safety” – including making myself available to any inquiries, ideas, and feedback; acknowledging the limits of my own experience and understanding, and inviting individuals to participate more fully – I recognized that there were barriers that had been erected in prior years and in the first couple of weeks of this year that seemed to hold us back from more quickly and fully establishing a safe space for the team to operate. At times it was clear that progress was made – after our first discussion about divergent work style preferences, one individual noted that “trust building occurred today” while another assessed that we had “followed our norm of ‘honest conversations.’” (T/S Team Meeting Notes, November 3, 2014). However, others still expressed to me individually, and at times to the team, a lack of trust that was hindering full participation and commitment to the collective work of the team.

The stop-and-go nature of our meetings sometimes took a toll on the team’s identity and its expressed commitment to “become an interdependent team working well across the whole system.” I found myself striving to stay visibly positive and committed to the concept of the team at our meetings. Again, guidance from DuFour helped reinforce this approach, even when it felt like I was cheerleading to myself: “Leaders of PLCs must consistently communicate, through their words and their actions, their conviction that the people in their

[group] are capable of accomplishing great things through their collective efforts” (DuFour et al., 2006, p. 199).

Outside the team, clear organizational support for those engaging in execution-as-learning signaled that learning was valued by providing time and resources, encouraging participation, and removing barriers to success (Wenger et al., 2002a). Toward the end of an October meeting where the team had been grappling with its purpose, the executive administrator who regularly attended the meetings used the opportunity to demonstrate the district office’s support for the work of the TOSA/specialist team:

We are doing something unusual here. It usually doesn’t work, collaborating to do the work at scale. It is much easier to hive off and do your own thing. But it’s worth the struggle. Inertia is working against this type of collaboration. Give yourself grace. This will require struggle for a while. But the overall outcome has the potential to be great. The more you know about each other, the better. This is a grand experiment and the work is important. (T/S Team Meeting Notes, October 27, 2014)

Hackman (2002) takes the support of teams a step further by focusing on the availability of expert coaching to guide the members of the team in their work. We had at our disposal a number of different types of experts who could help guide the work of the team, some of which I took advantage of and some of which, in retrospect, I failed to engage to the benefit of the team. Within our own team, we had TOSAs and specialists who had been in these respective roles for one or more years as we began the school year. As I endeavored to form the team as a whole, I shied away from explicitly promoting the veteran TOSAs and therefore did not tap into that experience and expertise in a meaningful way. That missed opportunity was compounded by the missed early meetings, which mitigated their visibility as such experts within the group, the opportunity to share when minds were most open, and a sense of commitment to the team as perceived by others. Periodically, I asked members of the team to lead conversations and offer specific perspectives, which provided an

opportunity to informally coach each other. In terms of coaching available outside of the team, all of the TOSAs and specialists had supervisors with whom they engaged in the content of their individual work. Coaching on individual performance occurred within these domains.

5) Outcomes – Fulfilling the Purpose

Finally, an effective team is focused on the ultimate outcomes, the reason for its existence, the rationale for bringing the mix of skills and personalities together to devise a purpose and a commitment to the way the work is done. From the literature on teams, Katzenbach & Smith and DuFour et al. hold similar perspectives on the close link between the purpose and the outcome. Individual comments made during our opening “Hopes & Fears” discussion represented potential outcomes for the team’s work, some that were observable and measurable in the short-term (e.g. “our time working together is acknowledged and understood as part of our job” and “coordinate our work with schools, through visit schedules, emails, common language”) and others that had longer-term implications for the system (e.g. “kids do better as a direct result of our work” and “we help build sustainable, district-wide systems that last beyond us”). The hopes and fears expressed also crossed the three general outcomes that Hackman believes apply to all teams: serve clients (teachers and principals) well, grow as a team, and learn as individual members (see Table 2).

As the team delved into the work of drafting a team theory of action, that statement also became part of the outcomes we were seeking from our work:

If we, the TOSA/specialist team, collaborate to provide differentiated support based on identified and prioritized professional learning needs, then teachers will be empowered to refine their practice, resulting in increased learning and social-emotional development for all students as envisioned in the Bellingham Promise.

In particular, the goal of empowering teachers to refine their practice to result in better outcomes for students emerged as the ultimate outcome the TOSA/specialist team was seeking. Feedback mechanisms used with teachers help illustrate the impact TOSAs and specialists had on teachers' practice. After an elementary math professional development session, teachers reported getting "solidified at mathematical practices," "a better understanding of the math practices," and "more language to use during math talks." Teachers in literacy PLCs reported that they had learned about "development of character and plot" and now "We are writing every day and talking about being writers. I'm seeing growth!" Although self-reported data, these representative statements show that the impact within specific content areas was positive. However, other statements from teachers reflected that the increase in the number of TOSAs and specialists and their support may have overwhelmed some teachers: "I still feel I am out of my classroom too much, with TPEP, PLCs;" "I want more support time to fit it all in and do well;" and "I would love to see more differentiation and choices on [professional development days] so that I can choose where to go that best supports me at that time." While it may be hard to assess the role that the team development specifically played in impacting teachers' practice, there is a high likelihood that in the absence of the time dedicated toward team development, the coordination among TOSAs and specialists would have been worse and the connecting thread of grounding professional learning in the district's instructional framework would have been missing. While there is still considerable work to be done to provide more coherent support to teachers, individual work and elements of the team development very likely contributed to overall growth and development of teachers this year.

At a late February meeting that began with an opportunity to "tend" to the team's drafted theory of action, the whole group discussion began with the reflection that, generally,

the team was doing the work that needed to come *before* what was outlined in the theory of action. Teachers needed to build some basic technical skills to implement the new initiatives, such as administering the new standards-aligned online testing. There was no time for teachers to refine their practice through reflective work with TOSAs and specialists. While this technical support seemed necessary, the team didn't feel like it was work that was impacting instruction (T/S Team Meeting Notes, February 23, 2015). Although the discussion began with why focusing on the technical aspects of the work didn't allow for the team to act on its drafted theory of action, it soon pivoted to another realization that the team was still not being systematic with the strategies it was asking teachers to learn.

As team members shared updates from their work, they recognized that, for the most part, they were still interacting with teachers individually from a content perspective, with, for example, the PLCs focused on literacy operating separately from the monthly math professional development session. "I know that teachers are completely focused on literacy when I'm working with them, and then [she] works with them and they are completely focused on their math instruction, and then the next day, [he] is there and it's all about technology integration. It's just too many different things to be able to actually change anything in their practice" (T/S Team Meeting Notes, February 23, 2015). There were some examples of coordinated work, for example between the highly capable and Math TOSAs to support middle school math teachers with how differentiate for different learners, but these were relatively few in comparison to all the work the team members were doing with teachers. The experience from the teachers' perspective was not the coherent approach that the team sought.

An effective bridge between teachers and district office would be able to continually hold that experience of teachers in one hand while supporting the implementation of district

initiatives in the other hand, continuously crafting or negotiating “the fit between external demands and [teachers] schools’ own goals and strategies” (Honig & Hatch, 2004, p. 17).

While each of the members was managing for the teachers’ experience within his or her own content areas, the expectation of effectively bridging teachers and central office to improve coherence required them to manage for the teachers’ holistic experience by collaborating on the district side. This was a reality of which the team was increasingly aware over the course of its work during the year.

While the ability to describe the ultimate outcomes is limited by the ten-month residency, leading indicators from central administrators, principals, teachers, and team members themselves suggested that the team helped manage the tension that exists with implementing education reform between district-directed priorities and site-based autonomy to deliver on those priorities. A more complete discussion of the outcomes and an analysis of the progress of the project toward are presented in the subsequent analysis section.

Analysis

“We believe teaching children to do their best involves self-reflection and reaching higher.”

- The Bellingham Promise

Embedded within the core beliefs of the Bellingham Promise is this value statement that could be read, agreed to with a quick nod of the head, and then promptly forgotten as one continues to scan the rest of community’s core beliefs. But within this simple statement is one of the keys to how Bellingham has set a course for empowering every child to discover and develop a passion, contribute to the community, and achieve a fulfilling and productive life. While a first read likely focuses on teaching *children* to be reflective learners and to set high expectations for their own growth and development, a second reading may reveal the absence of a specific subject for *who* is doing the self-reflecting and reaching

higher in service of teaching children to do their best. In a community guided by a vision to serve all children holistically, it is equally important that the teachers and administrators in the system are continually reflective and ambitious in their goals. The invaluable role that adults who interact with children – whether parents, teachers, administrators, or community members – play in modeling the process of achieving our sought outcomes cannot be understated. One member of the executive team has often reminded us of this modeling role, suggesting at our retreat in August that we link our own professional and personal goals for the year to outcomes in the Bellingham Promise.

Developing the team of district-level teacher leaders who are tasked with supporting teachers, principals and schools sits squarely in the center of Bellingham’s key strategy of “Great Teaching with Strong Support.” Developing the team to effectively deliver on that strategy requires attention to the core beliefs that guide our system. As adult learners and leaders, we need to be self-reflective and reaching higher; as Peter Senge reminds us about leading in learning organizations, “through learning, we re-create ourselves” (Senge, 2006, p. 14). Shifting from individuals fulfilling their individual job descriptions to a team delivering on the Bellingham Promise requires a re-creation of how we do the work, and, toward that, a recreation of self. The research questions I sought to answer through this strategic project focused on this transition from individuals to team:

- How can a group of individual teacher leaders be developed into an effective team to support teachers in their professional learning?
- How can a team of teacher leaders serve as an effective bridge between classroom teachers and central office administrators to improve teaching practice and student learning?

This section analyzes the evidence on the TOSA/specialist team development, guided by the research on what makes an effective team, in the context of central office transformation.

From the beginning, my strategic project entailed two phases that, if progressing forward,

would overlap in their occurrences. First, I endeavored to lead individuals tasked with supporting a particular strand of work into being a team working coherently at a system level to effectively support the Bellingham Promise. This charge came from my earliest conversations with district administrators whose goal was to have the TOSA/specialist group “function like a team” by “breaking down barriers between programs and activities” and establishing a “common vision around quality instruction” to better support schools.

Second, I hoped to demonstrate that this team of teacher leaders could serve a unique and valuable role in bridging the distance between classrooms and central office. This bridge would improve the way that a central office supported teaching and learning by engaging “problems of teaching practice and leadership practice, and stimulating changes in teaching practice that actually improve student learning” (Knapp et al., 2014, p. 11). This second goal emerged from finding myself in a district that was undertaking the hard work of transforming its central office. I wanted to help push that ambitious work a little further.

The theory of action driving my work with the team posited that:

If I create the conditions for the TOSA/specialist team to become high functioning through collectively developing a meaningful common purpose, ensuring psychological safety, and engaging in interdependent tasks, then the TOSA/specialist team will serve as an effective bridge between central office administrators and teachers in schools, so teachers will be better supported in their professional learning and teaching will improve, resulting in improved outcomes for students.

In the previous section, I described what I did and its observable results within a framework consisting of the characteristics of effective teams. The alignment between my strategy and these characteristics, while by no means complete, does show the cause and effect of my strategy, particularly with regards to the team development phase of the project. However, to understand how the team worked within the district’s central office, it is imperative to evaluate the team’s development in the context of a transforming central office since it did not occur in a vacuum. To analyze why the development of the TOSA/specialist

team progressed the way it did and impacted the work of the Department of Teaching and Learning in the ways that it did, I will return to the five enabling conditions identified by Honig & Copland (in Knapp et al., 2014, p. 103) as a starting point for engaging in true transformation of a district office:

1. Getting the right people in the right roles and clarifying work to be done;
2. Anchoring the work to an explicit theory of action;
3. Continuously supporting professional learning of leaders, as well as others, at both the central office and school levels;
4. Protecting people's work so it can stay focused on learning improvement; and
5. Developing and using evidence through/about central office practice to support continuous improvement in the performance of central office.

These five enabling conditions “stood out as essential” across all the districts Honig & Copland studied and therefore represent the foundation of what central offices need to do to enable and help sustain the transformation into a support organization for improved teaching and learning throughout a district (2014, p. 105).

Getting the right people in the right roles and clarifying work to be done

Honig & Copland's work has primarily focused on central office administrators, whom they call Instructional Leadership Directors. This strategic project has endeavored to find a place for district-level teacher leaders within the central office transformation framework. While there have been individual TOSAs and specialists within Bellingham Public Schools for years, their substantial increase in number for the 2014-15 school year, in conjunction with the continued efforts of the central office to improve its support for instructional improvement, warranted a heightened focus on what this district-level teacher leader role was and what it should be doing. Often considered some of the “best and brightest” of the district's teachers and coaches, by their individual selection TOSAs have already been identified as the “right people” for these district-wide roles. They are “experts” as they “have acquired extensive knowledge that affects what they notice and how they

organize, represent, and interpret information in their environment” (Bransford, Brown, & Cocking, 2000, p. 31). Ideally these teacher leaders are selected for their ability to “identify really good teaching and explicate what makes teaching ‘really good,’” something that researchers have found often lacking among those in educational leadership roles (Fink & Markholt, 2011, p. 239).

In terms of the “right roles,” the official job descriptions used to recruit and hire the TOSAs and specialists differ on some of the specifics but most often include the responsibility to “provide leadership in professional development” and “provide mentoring and coaching for teachers” among the first responsibilities listed. Through this work, I sought to develop an operational definition of what it means for this role to “bridge” classrooms and central office. For much of their time, TOSAs and specialists are working directly with classroom teachers, seeking to understand how these colleagues are approaching the work of continuous improvement in service of high quality education for students. For a portion of their time, they are working within central services, developing, implementing, and analyzing the system’s priorities. In working both with classroom teachers and central office administrators, TOSAs and specialists are operating in two distinct worlds. Their colleagues in both environments expect them to be able to speak the language and contextualize information to fit the setting. In this way, TOSAs and specialists are constantly holding multiple perspectives on the work.

While the job’s tasks with teachers and with individual administrators may have been fairly straight forward, several conversations with TOSAs and administrators revealed a lack of clarity about how TOSAs fit into central office, particularly within the Department of Teaching and Learning. While its meetings alone do not determine a department, that TOSAs and specialists were not regular participants in weekly DTL meetings may have

contributed to the questions about the relationship between them and the directors. Honig & Copland hold that “districts have to get clear what the (new) work is, what the positions are –and aren’t—responsible for, and where mutual or shared responsibilities lie” (2014, p. 107). Not having that clarity creates uncertainty in the work.

Directors reflecting on how the DTL has changed over the last couple of years, and particularly under the leadership of Dr. Copland, referenced greater, though still evolving, understanding of the goals of the team, as illustrated in developing a theory of action. Adopting a common instructional framework and identifying a district-wide dimension of focus for the year were also means of setting the expectations for how the district office would support instructional work in schools. This type of work was new in its implementation and still in the early stages in terms of assessing its contributions to a learning-focused approach to district leadership.

As administrators work with district-level teacher leaders, clarity around the sphere of influence is essential for ensuring there is purpose for the work. As Portner & Collins advise principals leading teacher leaders, it is important to define the sphere of influence that teacher leaders have: “It can be demoralizing for both teacher and principal when the budding teacher leader feels empowered to take those first tentative steps outside their comfort zone and take on change, only to discover that the change was outside of their sphere” (2014, p. 25). During our first few months together, I focused on developing a common purpose as a key design element of forming this team; however, members still expressed a lack of clarity into December: “[I still wish I knew] where we are going, what is the work of the team” and “[I still wish I knew] the vision of DTL in regards to the TOSA team and teacher leadership” (T/S Team Meeting Notes, December 1, 2014). Some progress was made by February, but there was still a sense of unfinished work around

clarifying the work of the team. As one member wrote to me in response to gathering agenda items for an upcoming meeting:

I thought we were in a great place the week before the 5D meeting when we were doing some group processing. I think we were talking about how we continue to improve our time and outcomes working together, trying to solidify this group and its purpose.

Evidence of how the team was developing toward “clarifying the work to be done” and identifying “where mutual or shared responsibilities lie” can be found in the process of developing a team theory of action. While I worked on a purpose for the team, a clarification of the work the TOSAs and specialists would do as a constituted team, from the very beginning of my residency, it is the team’s work toward developing a theory of action and its attention to iterating on it to fit the work and aspirations of the team that reflects the growing clarity around the work to be done. While the individuals needed a leader who could focus on the process of shifting from individually focused scopes of work to a team-oriented approach to strong support, it is the team itself who ultimately crafted the theory of action and began to request time on the agenda to periodically revisit the statement.

Team development was also evident in the regular practice of meeting “starters” that focused on professional and personal celebrations and acknowledgments. DuFour et al. examine developing and sustaining the organizational change process necessary for effective PLCs, noting the shifts needed “from independence to interdependence” and “from infrequent generic recognition to frequent specific recognition and a culture of celebration that creates many winners” (2006, p. 189). As the web connecting individual members to each other continued to grow throughout the year, more members were being recognized by different colleagues in these acknowledgements. Simultaneously, as cited above, there were examples of executives, directors and principals recognizing the collective work of the team and its positive impact on support to teachers.

Absent access to formal evaluations of the individual TOSAs and specialists to reflect whether they are the right people for the specific roles they have been hired, anecdotal reports from their clients (teachers and principals) and their supervisors (DTL directors) by-and-large were positive and appreciative of the work they did on a daily basis. In terms of clarity of the role, there is room for improvement here as the team wrestled with its purpose *as a team* throughout the course of the project. Options for changing key aspects of the role became a focal point of team discussions beginning in March, the full description and analysis of which is outside the scope of this paper. Some of the details of these proposals, however, will be addressed in the Implications for Site section of the paper.

Anchoring the work to an explicit theory of action

Closely related to clarifying the work to be done is situating that work within a causal chain whereby actions are explicitly linked to the desired outcomes. A theory of action provides “not just the *what* of the work but also the *why*” (in Knapp et al., 2014, p. 108). Our work on a team theory of action was really spurred by one TOSA noticing posters of the DTL theory of action hung up in the directors’ shared office and wondering why the TOSA/specialist team was unaware of its existence. Compounding the existing lack of clarity around the relationship with the directors, this disconnection between the DTL theory of action and the TOSA/specialist team illuminated a gap in how the constellation of work to support schools was conceived and collectively tackled among the two groups. Between December and February, the team developed and revised its own theory of action:

If we, the TOSA/Specialist team, collaborate to provide differentiated support based on identified and prioritized professional learning needs, then teachers will be empowered to refine their practice, resulting in increased learning and social development for all students, as envisioned in the Bellingham Promise.

After delving into a theory of action process themselves, members of the team saw the value in developing a team-specific theory: “I used to think that DT&L Theory of Action would drive our work, but now I see our work with a more specific theory of action linked to DT&L directors’ Theory of Action” (T/S Team Meeting Notes, December 1, 2014). The iterative process of developing a theory of action became an important way to continue to advance our collective thinking about our purpose and the way we do our work through reflection over the next several weeks: “it is the act of repeatedly revisiting the theory in the presence of colleagues that matters most for people’s learning” (City et al., 2009, p. 53). Anchoring the work in the theory by periodically revisiting and refining it resonated with members of the team: “I love the idea of continually working on a theory of action and continuing to suss that out” and “Is it time to take another stab at our Theory of Action? I think it would be timely to revisit” (T/S Team Meeting Notes, February 23, 2015).

The drafted theory of action positioned the teacher leaders as working together in service of teachers, forming one part of the expected bridge. However, there was no explicit mention of their role within the district office and/or the connection between the TOSA/specialist team and the directors, with whom individuals worked closely but whole groups had yet to establish a systematic way of collaborating together.

It is important to note that the TOSA/specialist team’s inquiry about the DTL theory of action – and specifically that these teacher leaders did not explicitly see themselves as part of the department’s theory of action – helped impel the directors to revisit their own theory of action in February and March, opening up the discussion about the relationship between directors, TOSA/specialists and principals. This revision process illustrates the orientation toward self-reflection and reaching higher. Again, a full description and analysis

of this recent development is outside the scope of this paper but it will be considered within the Implications for Site section.

Continuously supporting professional learning of leaders, as well as others, at both the central office and school levels

As modelers, coaches, and facilitators, TOSAs and specialists are highly focused on the professional learning of others, particularly at the school level, within their specific content area. While they worked with teachers directly as their primary means of support, TOSAs and specialists often supported principals in planning for building-based professional development opportunities. In March, the directors administered a survey to the district's 35 principals and assistant principals that focused on the responsiveness and helpfulness of directors, TOSAs, and specialists to principals and their schools over the year to date. All of the full-time TOSAs and specialists were mentioned by name or program for having partnered with principals for professional development support in their building during the year. Specific individuals, supports, and programs were identified by (mostly elementary) principals as things the TOSA/specialists "are doing well that we should keep doing to support your work":

- [Special Education] TOSAs have been a big support to our [teams].
- Student Growth Collaboration meetings [led by the literacy TOSAs] are highly successful and should continue!
- The math implementation, and especially the shifts as the team received and responded to feedback from teachers, has been great!
- I depend on the professional development support around literacy and math from the DTL and Specialists, as well as the highly trained facilitation of SGCs in our schools.
- Throughout the school year, I have asked for additional support from both directors and TOSAs and received the help in a timely fashion.

While the questions differed slightly from the previous year's survey (I recommended that TOSAs and specialists be explicitly named in one additional questions), it is notable that the

principals' responses in 2014-15 included more mentions of the TOSAs and specialists and their work than in the previous year, which can be attributed to the overall increase in the number of TOSAs and specialists and the visibility of their work.

Despite the clear utilization of TOSAs and specialists at many buildings during the year, there were observable tensions with some principals at some levels around some scopes of work. While this tension is not reserved for TOSAs and specialists alone (directors have also experienced difficulty accessing some principals when attempting to support the implementation of the new teacher evaluation system), district-level teacher leaders face a greater credibility gap since they are trying to work in schools and even at levels where they have had little to no experience. Additionally, the traditional hierarchy in school systems places the principal above the teacher. In some cases, schools with principals who were less receptive to TOSAs and specialists in their building simply received less district-level support in these areas. In other cases, TOSAs and specialists focused their support on requesting individual teachers and teams, rather than through a whole-school approach. Finally, in some cases, TOSAs and specialists altered their approach and looked for ways to integrate their specific support into existing systems to avoid being perceived as an additional initiative that principals and teachers had to manage.

To effectively deliver on the role of “providing leadership in professional development,” TOSAs and specialists themselves require new professional learning on both the content of what they are teaching and effective means of working with adult learners. The first official gathering of the team, together with the directors, was a two-day training that aimed to ground the work that central services would be doing with teachers and principals in the district’s common framework for improving teaching and learning. Evaluations collected from the TOSAs and specialists from this learning highlighted the high

value of both the content learned and the process of learning that new content in the presence of these colleagues.

The follow-up Mentoring Matters training sought to enhance their skills for working with adult learners. The evaluations included similar reflections about the value of both the content focused on working with teachers in learning-focused relationships and the process of being able to reflect and learn with colleagues. An opportunity to revisit the mentoring practices at the next team meeting was cited by several members as an appreciated follow-on: “Great to have the time and space for collaboration and review of past learning was value added” (T/S Team Notes, September 22, 2014). The full-day session using the Insights Discovery Profile to uncover assumptions and perceptions about individual work preferences and understand the team’s make-up was another example of supporting professional learning among these leaders. Learning about self provided a new entry into improving the ways in which the members of the team worked together as a team. Moreover, this training offered a cognitive break from the planning, implementing, and evaluating of support for teachers and schools to be self-reflective and set goals for how to improve the work (T/S Team Insights Training, January 5, 2015).

Finally, the regular meetings themselves were a means of supporting the professional learning of these leaders. By having a forum to share the work, both the successes and the challenges, there were opportunities for ongoing learning among peers. From a pre-Thanksgiving meeting, one member wrote of being thankful for “the eagerness of colleagues to learn, grow, improve and collaborate” while another reflected “I’m grateful for the daily opportunities to push at the boundaries of my skill set and knowledge” (T/S Team Meeting Notes, November 24, 2014). The opportunity for cumulative learning over the course of several months together contributed to building expertise: “the knowledge of experts is an

accumulation of experience – a kind of ‘residue’ of their actions, thinking, and conversations – that remains a dynamic part of their ongoing experience. This type of knowledge is much more a living process than a static body of information” (Wenger et al., 2002b, p. 9). It is also something that is much harder to recognize and measure. In mid-March, I had a one-on-one check-in with one of the TOSAs who throughout the year was regularly searching for more ways to turn the conversations into actions, as reflected in a statement during the March 16 meeting: “What can we ‘do’? We are talking about a lot of things, but what can we do?” (T/S Team Meeting Notes, March 16, 2015). In our one-on-one, he acknowledged that he was regularly implementing things he was learning about from his colleagues during team meetings in his work out in schools. Prior to our conversation, he had not seemed to have reflected that this was a means of “doing something” that came out of the team’s regular meetings.

Protecting people’s work so it can stay focused on learning improvement

In transforming central office practice to better support teaching and learning, Honig & Copland found that districts identified and delegated tasks and responsibilities that would detract ILLDs from a clear focus on supporting schools. What was initially unclear about the role of district-level teacher leaders is whether they were serving as a means of helping directors’ protect their time by carrying some of the administrative task load, helping principals’ protect their time by co-planning professional development and providing direct support to their teachers, or whether the teacher leaders themselves were in need of a way to protect their time to ensure that they are providing a high level of support to principals and teachers. It is clear from the work this year that the role is a combination of all of the above.

With respect to the relationship with directors, several of the job descriptions included one or two responsibilities (of 10 to 15 enumerated) similar to “Support the Director in program review, communication, program development and implementation” and all included a version of “Perform duties, tasks, responsibilities related to the program as requested by the director.” The experience with respect to directors varied across TOSAs. The most veteran TOSAs had largely charted their own course in their first two years and, based upon that success, were primarily left to continue what they had been building over the last several years, while also taking on additional specific responsibilities that aligned with their administrative credentialing process during the year. For others, the level of administrative work required for their specific role was surprising, whether it was the organization of materials associated with a new curriculum adoption or the logistics of administering a special program for students:

I had a job description when I interviewed for the job and what I actually do doesn't match that in very many cases at all. So I was anticipating – my job description is all about going out into classrooms and supporting teachers – I had anticipated it would be a 60-40, 70-30 [split] – mostly out in schools and some of the time back here. I had done PD before and I knew preparing PD took time so I had the expectation that I would need some planning time. But I did not have the expectation that there would be so many administrative functions to the role. Just getting the administrative work done precludes that there could ever be a 70-30 split.

For TOSAs who were in newly conceived roles, the position took form in real-time, as there was little prior experience upon which to build. These new roles in particular appeared to help protect their associated directors' time while also introducing and addressing new streams of work that had not existed previously. In general, it appears that the addition of TOSAs and specialists to the central office team can help to protect some of directors' work time to focus specifically on instructional leadership with principals.

In terms of helping to protect principals' time, evidence supporting my initial theory that teacher leaders could help alleviate the responsibilities loaded on the “superprincipal”

showed mixed results. Those teacher leaders who had a direct link to one or more buildings were able to share some of the load of instructional support to teachers, particularly among the ELL specialists and the ongoing implementation of sheltered English strategies across classrooms in those schools. At the beginning of the year, a number of the middle and high school principals were unfamiliar with the support available to them and their schools through the TOSA/specialist team. Since many TOSAs had no explicit connection to specific schools, principals did not necessarily see them as a specific support to them, and, in some cases, saw the initiatives they represented as an additional burden to manage when it meant new trainings for teachers around clustering for highly capable learners, for example. In response to a survey question about whether, and with whom, principals had partnered with TOSAs and specialists to plan professional development, one elementary principal reported, “I struggle with the concept that our HCL TOSAs and ELL [specialists] should be instructional coaches to teachers in buildings where they have very little connection with teachers and students.” However, 11 out of 20 responding principals listed at least one TOSA/specialist with whom they had partnered this year, with eight of nine elementary principals listing multiple individuals. This is a substantial increase over the times TOSA/specialists were mentioned in the previous year’s survey.

In terms of finding ways to protect their own time, there were no specific mechanisms in place aimed at shielding TOSAs and specialists from engaging in tasks that detracted from the work of instructional support. Some utilized secretarial support available through their supervising director and program, but these relationships were not always clear and they were not available to all team members. One of the by-products of the unclear relationship with directors may be a time-protector: TOSAs and specialists are not involved in the regular DTL meetings of directors, which means they have an average of almost eight

more hours each month to work in direct support of teachers. However, there are trade-offs that come with not being part of these meetings with respect to coherence across the system.

Developing and using evidence through/about central office practice to support continuous improvement in the performance of central office

Transformation efforts require methods for assessing how it is going and identifying where improvements should be made. In analyzing the learning in teams, Senge (2006) references the tendency to try to streamline “complex, dynamic problems” so that “simple, obvious solutions” can be applied. Not only is this a short-term approach, Senge finds that “the problems compound in a diverse, cross-functional team” because “each team member carries his or her own, predominantly linear mental models” that “focus on different part of the system” and “emphasize different cause-effect chains” which “makes it virtually impossible for a shared picture of the system as a whole to emerge” (2006, p. 267). Honig & Copland’s condition of developing and using evidence to support continuous improvement is grounded in the idea of developing that shared picture of the system. The real challenge in examining evidence is to develop a way that honors the complexity of the situation and does not revert to constructing a single “mental model” as impetus to make a single change.

Again examining the data at two levels – the work within the team and the team’s work within the district office – there were some examples of developing and using evidence to support continuous improvement and areas where this could be much more robust. In our regular meetings, I included a “plus-delta” protocol for feedback on the meeting into every agenda. In the beginning, this feedback provided helpful insights into what worked well (plus) and what could be improved upon for the next meeting (delta). However, as meeting discussions got deeper and harder to cut off, the agenda was frequently too full for the time allotted. Both because it was situated last on the agenda and because at times I felt

like it might be interpreted as a way for me to get personal feedback, rather than a mechanism for the whole team to improve, for most of the meetings after November, I allowed the penultimate item to stretch until our ending time and did not facilitate a feedback protocol. I employed other mechanisms for garnering some feedback, including one-on-one conversations (either planned or on-the-fly), as well as checking in with directors for any indirect feedback they were hearing from the TOSAs and specialists they supervised. While these less formal methods may have helped “create a feeling...that they were being listened to and acknowledged for their work,” (Knapp et al., 2014, p. 118), skipping the “plus-delta” protocol in the latter half of the project wasted opportunities for self-reflection and may have threatened the earlier gains made toward establishing a culture of continuous learning and reaching higher.

On an individual level, I attempted to provide feedback where it seemed appropriate and without crowding in on the role of my Director colleagues who were supervising these TOSAs and specialists. I added their professional development offerings to my calendar as “FYI” entries and then tried to make sure I visited as many as possible when my schedule allowed. Anecdotally, it appeared that this level of feedback to some of the TOSAs was unusual, and appreciated. Upon sending my reflections to one of the returning TOSAs, I received the comment that I was the first person in three and a half years to give written feedback. After another observation a few weeks later:

Well, you've done it again. This is the most feedback I have ever been given as a TOSA. Thank you. I appreciate your perspective and capturing the details and the broad strokes. You picked up on some dynamics that I was navigating and your view is helpful to me in reflecting on the facilitation decisions I made- good or bad.

At a system level, team members used course evaluations (tied to individual participants earning continuing education credits) and anonymous pre- and post- surveys to gather feedback on the effectiveness and usefulness of their professional learning offerings.

Teachers expressed the value of working with the TOSAs in end-of-session feedback protocols where teachers listed what they “Got” from the session – “[they] meet our learning needs; [this] PD time is the most beneficial of all our PD time in the district” – and what they still “Want” – “more time with you, you get us and help so much; miss our PD grade level time with [TOSAs] – purposeful, intentional and extremely helpful; more time with [TOSAs] at my school; more [TOSAs] whole day.”

The March survey of the district’s principals cited above also provided specific feedback around responsiveness, communication (e.g. “A clear, concise system for communication needs to be developed), attention to professional growth (e.g. “I’d like to see us form smaller groups of elementary principals around a common area of focus...to further professional learning.”), and support for district initiatives (e.g. “Pacing the initiatives!”). Asking for, analyzing, and responding to direct feedback from the “clients” demonstrates an orientation toward using evidence to support continuous improvement and provides an opportunity to reflect as a team for how to reach higher to do better.

These five enabling conditions help to clarify the place that district-level teacher leaders occupy within the transformation of a central office toward supporting improved teaching and learning in schools. From my analysis, it is clear that the teacher leaders fit into this framework and in several cases make specific contributions to ensuring that these conditions are met. However, in addition to these conditions, teacher leaders need to ensure the presence of a sixth enabling condition in order to successfully bridge the work between classrooms and central services.

Holding multiple perspectives to effectively bridge classrooms and central office

In focusing on the role of district-level teacher leaders, I have posited that they occupy a unique position between their teacher colleagues in classrooms and their district colleagues in central office. While the TOSA/specialist role may be one way to chart a path toward more senior level administrative leadership, for the time in the position, retaining the title of teacher or specialist indicates a continued connection to colleagues in the classroom. However, it is clear from conversations with TOSAs, administrators, and teachers that this is easier said than done. These district-level teacher leaders have made explicit efforts to sustain that connection with their colleagues in the classroom while simultaneously building relationships and credibility with their colleagues in the district office. While TOSA roles are typically budgeted as one-year positions, the reality is that most stay in the role for at least two years, if not more, due to the scope of work inherent in district-wide curriculum adoptions and program reviews. As TOSAs transition into their second year, there may be a sense from their teacher colleagues that “you are one of them now,” as one former TOSA recounted, perceived as a spy from central office during his second year in the post.

In their regular work with teachers, I observed TOSA/specialists endeavoring to keep that strong connection to the classroom. In one notable case, a TOSA used the present tense to describe what she would do with implementing the new curriculum in her classroom, even though she did not have any teaching responsibilities at the time. A former central office administrator reflected on the work of some TOSAs: “Part of the reason their work is so valued is that they are very in tune with where teachers are coming from and always adjust to that.” Taking on the perspective of the teacher working daily in the classroom was a means of bridging between the role of leading professional learning for the district and that of a colleague in the classroom. I also observed directors and executive

administrators increasingly involving the TOSA/specialist team in problem analysis and decision-making. While this may have occurred in the past with individual TOSAs and specialists, there was more attention to having the input of the broader team, with directors requesting time on the team's meeting agendas and requests for the team to participate in directors' meetings.

At the same time, to be an effective bridge, the TOSAs and specialists needed to acquire and hold a district-level perspective as well. The direct link to a supervisor already situated within DTL was a central means by which the teacher leaders developed this perspective. The location of the TOSAs and specialists office in central office and down the hall from the DTL's offices also helped assimilate the teacher leaders into the central office.² Having the office within the main district office enabled closer collaboration with directors (both supervisors and others) and enabled ad hoc meetings to occur. The lack of a formal onboarding process, as described by one of the TOSAs earlier, that included foundational information about how the district office operates may have inhibited an earlier and more thorough acquisition of the district perspective by new TOSAs and specialists.

It should be noted that district-level teacher leaders also interact with principals and may at times need to be able to hold their perspective to effectively provide support to the schools. However, TOSAs and specialists have not typically had the experience of being a principal (although some are studying school administration and are aspiring to be principals). The difficulty that some teacher leaders had in working with some principals may have emanated from not having any specific mechanisms for helping TOSAs and specialists understand principals' perspectives, and vice versa.

Holding multiple perspectives in working with teachers and administrators gets at the core of the challenge of the loose-tight leadership that exists within school districts. TOSAs

and specialists must have the perspective of district administrators who are holding tight the critical outcomes that must be accomplished. They also must have the perspective of teachers who are positioned to decide how these outcomes will get accomplished on a day-to-day basis. Thus, as a primary liaison between central office and classrooms, TOSAs and specialists develop collaborative, trusting, and collegial relationships with both teachers and administrators through holding these multiple perspectives and bridging the gap between schools and central office.

Implications for Site and Sector

Implications for Site

The implications for Bellingham Public Schools as a result of my analysis of this strategic project rest squarely within the context of taking a well-performing organization and striving to make it even better. Other observers of the district have taken a similar approach, including CTQ founder Barnett Berry, who proposed a partnership based on his assessment that “the content and tone of each conversation made it clear that BPS is ready for a bold brand of teacher leadership so the district can develop and execute both innovative and adaptive approaches to meet the needs of all of its 11,000 students” (B. Berry, personal communication, February 2015). That context presents its own type of leadership challenge because it requires dismantling a status quo that is acceptable to most in pursuit of a new, improved state of being. In his work on improving the quality of teaching, education researcher Dylan Wiliam captured the dilemma:

Effective leadership is rarely about stopping people doing unproductive things. In most public service organizations, people are in the main genuinely interested in doing good. The problem is that when resources are limited (as they always are) then whether something is good is irrelevant. What matters is whether there is something better that could be done with the same resources. That is why leadership is so hard. It requires preventing people from doing good things to give them time to do even better things. (Wiliam, 2010)

This process of stopping the good to get to the better is at the heart of a learning organization – “an organization continually expanding its capacity to create its future” (Senge, 2006, p. 14). From the beginning of my time in Bellingham, I have characterized the district as one that is high performing and yet refuses to be complacent. This ambition to be better can be seen in the constant attention to ensuring all students and families have equitable access to an excellent education. It can be seen in the endemic substitution of the phrase “yes, and” for “no” or “but” in conversations throughout district office. While several colleagues have remarked that the development of the TOSA/specialist team has been a notable improvement from previous years, the implications for site are grounded in a continuous improvement stance of “Yes, and there are so many things that we could be doing better.” The following set of recommendations for BPS’ district-wide teacher leadership builds on the analysis of how the team developed within the context of a transforming central office and includes recommendations that address tactical adjustments as well as the identification of more complex issues that require shifting established ways of working, both in schools and in the district office, to realize stronger support for great teaching. While the first four themes (collaboration time, function, continued learning, and leadership) mainly focus on changing structures to improve processes, the real work is embedded in the final two themes (position for maximum impact and bridging priorities and autonomy) and the necessary “cultural changes – changes in the assumptions, beliefs, values, and habits that constitute the norm for those within the organization” (Eaker & Gonzalez, 2006, pp. 7–8).

Time to Collaborate

This team, to really *be* a team, needs to have more opportunity and support for internal collaboration. Meeting for 75 minutes two to three times a month is not sufficient

time to ensure collaborative work that is proactive in supporting 600 teachers across 22 schools with several large-scale and important initiatives aimed at improving learning outcomes for students. Both San Diego Unified School District and Portland Public Schools have established schedules where instructional coaches and TOSAs are working in schools and classrooms four days a week and working and training alongside peers and other district experts on the fifth day (Darling-Hammond et al., 2005, p. 23; G. Baker, personal communication, January 8, 2015).

District office meeting schedules for the upcoming school year should be set early by late spring or early summer so that expectations are clearly communicated before the summer vacation. Full-time TOSAs and specialists should be expected to work from the district office during at least one common day a week. This common collaboration time, set on the same day as a regular TOSA/specialist team meeting and the directors' tactical and strategic meetings, could also be used for scheduling formal trainings and as-needed meetings. There was no alignment this year among the schedules of the part-time teacher leaders with respect to days and times scheduled for teaching versus providing professional support. Since teaching schedules are set at the school level, conversations with those in charge of master scheduling at affected schools should occur during the spring, once initial enrollment projections and staffing ratios have been released, toward the goal of aligning time devoted to the non-teaching responsibilities across the whole team. Given the number of teachers and schools the TOSAs and specialists support, it may be advisable to hold one half-day for three days a month and one full day a month for the directors' extended strategic meeting.

During this year, the team identified certain days when they are generally not needed in schools because teachers have special plans for their classes. These days included

Halloween, the day before Thanksgiving, the days immediately before and after Winter Break, and Valentine's Day.³ Scheduling these as half- or full-days before the school year starts and using them for additional training sessions or extended collaborative work time that could meet the emergent needs of the whole group or smaller subgroups that is difficult to accomplish during shorter weekly meeting. While this may seem to add up to a lot of time out of school buildings, if coordinated ahead of time, it could be very productive team time that is not taking away from time scheduled in schools. If one or more days end up not being needed, then they could be released from the calendar; it is far easier to cancel a scheduled meeting than it is to schedule a meeting once the year is underway. Scheduling these meeting before the school year begins would yield up to 65 hours for team collaboration and professional training over the 30 hours this year.⁴

Form Follows Function

In terms of the composition and size of the team, the primary driver is and should remain the identified needs in the district with regard to effective support for the Priorities for Progress. In terms of composition, there have, at times, been challenges with the fact that not everyone on the team has the same type of role; there are distinct differences between those who are working as full-time TOSAs and those who continue to have classroom teaching responsibilities. However, the diversity of current experiences has added valuable perspectives to the team's discussions and should be maintained as much as possible. With respect to one specialist who does not have a background in teaching and provides technical support for data analysis, continued participation on the team should be examined as to whether it is a valuable use of time. While the four part-time TOSAs tracked the team's progress through meeting notes, they were only physically with the team during three training opportunities that they prioritized for participation. A schedule that is planned

out well in advance and that attempts to align common work times from the beginning may increase overall participation in ways that do not negatively affect these teachers' other responsibilities.

With respect to size of the team, it is clear from responses to any announcement regarding staffing at the Department of Teaching and Learning that the school-based staff is highly sensitive to the size of the district office. While the overall impact of a collaborative DTL with individuals working across multiple dynamic work streams improves overall support, one unintended outcome may be that it is not always clear to those not in the department each person's specific role. Without that clarity, or adherence to traditional titles like Curriculum Director, additions to the group of "directors of teaching and learning" are subject to criticisms that the district office is getting too big. While TOSAs and specialists are distinct from directors, as district-level teacher leaders, additions to their ranks may be similarly judged if their role and responsibilities are not clearly articulated publicly. Additionally, while there is no definitive number for the ideal size of a team, it is important that every person contributes in a meaningful way. With the majority of collaborative work happening in meetings, the "right" number exists between having enough people to represent different perspectives in the system and engage in productive discussions but not so many as to limit full participation by all. From the experience this year, the team seemed most productive with around ten people at a meeting, enough to engage in small and whole group discussions and everyone's voice could be heard.

Building Capacity to Lead

Instructional framework and mentoring trainings offered in the beginning of the year that were designed to deepen TOSA/specialist knowledge and skills received very positive feedback. Remaining funds allocated to support the team should be used this summer to

target specific needs identified this year: trainings on whole group facilitation of adult learners and on the instructional framework, particularly the district's selected area of focus for the coming year. With the \$30,000 allocated in next year's budget, I suggest using a portion (beginning with \$10,000 in the first year one) for a "collaboration fund" that two or more team members with different core responsibilities are encouraged to apply for to pursue cross-disciplinary activities together.⁵ Awards from the fund could cover books for a group book study, conference fees and travel costs, or additional time to develop a new project aligned with identified needs within the district.

Team Leadership

At this point in time, there is no clear next leader of the team. By having a relative outsider (who was not a TOSA/specialist) facilitate the team all year, the team has gotten used to having someone else keep the momentum of the team moving forward. Part of the failure to transition to shared leadership within the team this spring resulted from my sense that the TOSAs and specialists were already stretched to their full capacity. There was no one person who could add meeting planning, facilitation and follow-up to their scope of work. However, leadership of the team could be built into the expected responsibilities of one of the team members for the coming year. This lead TOSA/specialist should be identified through an expression of interest process (and then could potentially be linked to a leadership project of an "Aspiring Administrator" if applicable). If the right person emerged as interested and capable, this change in structure would serve to further elevate the status of the TOSA/specialist team within DTL since the team itself would become responsible for liaising with directors and principals, in part through regularly participating in directors' meetings. This participation would build upon the liaison role that I played and may tighten the working relationship with directors through this more direct connection.

Position for Maximum Impact

District-level teacher leaders' ability to bridge schools and central office has been a key element of this strategic project from the beginning. In many of the elementary schools, where TOSAs had worked in previous years, the credibility of the role with teachers and principals was often strong. In a few of the elementary schools and in the middle and high schools, the value of the district-level teacher leader had to be proven. Evidence from the February principal survey shows clear progress in this direction across all levels. However, as the TOSA/specialists started to plan for next year, proposals abound for how their roles and the team could be reconfigured to help address challenges faced this year. All of these suggestions appear to be grounded in having established a team this year, each identifying what is possible given the existence of added support from a teaming structure.

One suggestion has been that TOSAs not be associated with a specific content area, student population, or program but rather are generalists who are able and expected to respond to an array of needs from teachers. This "first responder" approach would help to dismantle some of the existing silos by requiring, at a minimum, that TOSAs could offer a first level of response through deep understanding of the district's instructional framework as well as broad knowledge of the resources available across the system. If upon discovering that a particular problem is beyond his/her scope of expertise, the TOSA would then know the content expertise of his/her colleagues and be able to summon additional assistance.

Another suggestion that emerged from discussions among a small group of team members focused on where the TOSAs are situated. One TOSA sent the following email to the team:

What if we assigned each TOSA a full day per week around learning to lead, reviewing data and networking around building and specific teacher needs as a group (TEAM), but the remainder of the week was dedicated to a specific school or two (i.e. Me assigned to Alderwood and Kulshan- crossing levels and demographics, but

becoming part of the community at each school). This would give the district office access to the culture and needs of each school to support being truly responsive. This TOSA group could also collaboratively plan the PD to integrate the collective knowledge of the group.

This latter suggestion for reframing the current position may emanate in part from not being sure of their place within the Department of Teaching and Learning and looking for a sense of belonging back in schools. While one of the goals is to ensure a clear link from classrooms to central office, devolving the roles to work primarily at individual schools would risk losing the coherence sought through strong support from the district office. Instead, I recommend two changes within central office that could strengthen both the sense of belonging within DTL and the connection to schools: rebrand the DTL and encourage more cycling between classrooms and central office.

In the March 2015 revision of their theory of action, the directors rebalanced how the instructional leadership and support work happens. Rather than directors supporting the work of principals, who in turn support their teachers in achieving improved outcomes for students, now the directors, principals and teacher leaders are seen working in collaboration to support the instructional core of student, teacher, and content (see Appendix N: Revised DTL Theory of Action). This shift in the theory of action better reflects how Dr. Baker views the Department of Teaching and Learning as including principals and TOSAs/specialists alongside the directors. Concrete steps that could help realize this revised theory of action include being clearer when referring to the whole DTL and when referring to the directors specifically. Both principals and TOSAs/specialists will ask what DTL's position is on something or what DTL's plan is, not seeing themselves in that question. Regular tactical meetings of the directors should be referred to as directors' meetings. It is a minor rebranding that could impact the cohesiveness of the broader instructional leadership team.

Additionally, broader representation in meetings should also be considered as a means of increasing coherence and system awareness. At a minimum, the monthly strategic meeting should include representation from a principal from each level and the lead TOSA/specialist (or rotating designee). Scheduling collaboration days could allow the whole TOSA/specialist team to attend monthly strategic meetings. This addition would require restructuring the meeting's format to utilize smaller work groups (either standing or dynamic groups) since the whole group would prove to be unwieldy for active and inclusive participation. Including principals and TOSA/specialists in meetings could help broaden the conception of the DTL, lead to more informed decisions, and build a more inclusive community of instructional leaders in the district.

To strengthen the TOSA/specialists connection to schools, the vision for the position should be more fluid to include cycling from the classroom to central office and back again. The precedent is already set within the district, with two-way movement between the director role and the principal role. While this may be unusual in other districts where there is an expected "upward" trajectory from school to district-level positions, Bellingham supports a more holistic set of experiences to inform leadership. This mindset should extend to the role of teacher leaders, rather than the return of a TOSA to the classroom being seen as a sign of being unsuccessful at the central office. A more regular rotation that aligns with targeted work on particular curricular or programmatic areas would bring more qualified people into leadership roles and allow for some of the district's best educators to return to the classroom with new perspective and new energy.

Bridging Priorities and Autonomy

The balance between what is held tight by the central office and what is determined by those working on the ground is a constant challenge within education improvement work.

Based on years of studying school districts and the change process, Fullan (2011) asserts that the tension between loose and tight leadership is actually the coexistence of the two and that this culture of leadership “does not require less leadership at the top, but rather more – more of a different kind” (2011, p. 41). Part of this different kind of leadership is the district-level teacher leader who is living the tension of helping apply clear priorities and parameters that everyone is expected to observe while encouraging autonomy, which breeds ownership and innovation, within those parameters (Eaker & Gonzalez, 2006, p. 6).

Being skilled at holding multiple perspectives is part of the inquiry process that the team experimented with at times during the year. Using the inquiry process requires individuals to put aside their existing beliefs and assumptions to engage in a process of understanding without judgment. To effectively hold multiple perspectives, one must first take an inquiry stance, gather data by asking open questions, analyze the emerging data, and develop and test theories based on that data (Fink & Markholt, 2011, p. 230). District-level teacher leaders are carrying out these inquiries in both the school and district office setting, continually revising the theories based on the inquiry process.

As Bellingham Public Schools continues to position the central office as a strong support system for improved teaching and learning at all of its schools, it will constantly be working to strike a balance between what is held tight by the district and what is left to the discretion of the instructional leaders, including teachers, within schools. The TOSAs and specialists, in their work bridging schools and central office, have been and should continue to be a means of carrying out a coherent district-directed agenda, while empowering teachers to solve problems and improve practice in ways that reflect the realities on the ground. By holding multiple perspectives, the TOSA/specialist team is integral to managing the loose-tight approach to effective leadership of schools and districts.

Implications for Sector

The research on central office transformation and teacher leadership pays scant attention to the role of district-level teacher leaders in enabling a central office to transform its ways of working to better support teaching and learning in every school. The five enabling conditions for central office transformation offer the starting place for how district-level teacher leaders can assist with this transformation. However, the conditions were derived from close study of administrators and therefore did not cover the unique bridging role that these teacher leaders can play if they are able to work effectively with both school-based colleagues (teachers and principals) and with district-based colleagues.

Developing a district-level teacher leadership team from a group of highly qualified teacher leaders who had not previously been successfully integrated into a team illuminated both the opportunities that such a group of teacher leaders offer, as well as the challenges of operating in the ambiguity of neither fully being a teacher nor an administrator. Thus this project sought to uncover how a district organized around learning-focused leadership could best utilize district-level teacher leaders to effectively bridge the classroom and central office. In particular, in their daily work, these teacher leaders experience the tension of having clear district-wide priorities – being tight on the “ends” – while supporting individual autonomy around the “means.” My proposal of a sixth enabling condition – holding multiple perspectives to effectively bridge classrooms and central office – situates the unique hybrid role of the district-level teacher leader within the challenge of managing that tension of loose-tight leadership that exists in systems undertaking substantial education reforms or improvements.

Those reforms, what U.S. Secretary of Education Arne Duncan termed “a series of changes — in raising standards, in assessment of student learning, in systems for support

and evaluation of educators” are impacting classrooms and schools across the country (Duncan, 2014). In an effort to show support for the teachers who are on the frontlines of these changes, Duncan launched the Teach to Lead initiative aimed at encouraging schools and districts to provide more opportunities for authentic teacher leadership.⁶ In announcing the new initiative, Secretary Duncan said that in an era of substantial change in education, “teachers must shape what teaching will become” so teachers must “lead this change, now, for the good of your profession, and for the good of America’s children” (Duncan, 2014). While Secretary Duncan can use his public platform to call attention to the role of teachers as leaders, it is within the organizational culture of each district, and even individual schools, to determine how (and how well) teacher leaders will be identified, utilized, evaluated, and celebrated. Policies at the state level may enable and encourage more teachers to seek such leadership roles, but the impact of such roles will emanate from and ultimately serve local school districts. The implications from this strategic project with respect to how district-level teacher leaders can bridge centralized priorities and decentralized autonomy included above for Bellingham Public Schools, while specific to the structures and processes in that system, are helpful to the broader American education system and its 13,500 school districts. These districts are the engine of change within the education system and teacher leaders can serve as the piston rods that drive the organization to improved outcomes for students.

Positioning these teacher leaders where they can effectively bridge teachers and administrators and hold those two perspectives in balance will increase coherence across the system by legitimizing these often-contrasting standpoints to each other. Districts seeking to utilize teachers in this way will need to put structures and processes in place that enable teachers to maintain and leverage that hybrid role effectively (see Implications for Site section above for examples). Teacher leaders are part of the “different kind” of leadership

that is needed to manage the coexistence of non-discretionary district-wide priorities and parameters and ground-level autonomy that allows teachers to meet the needs of their students within those parameters. In being situated between classroom teachers and administrators, district-level teacher leaders are positioned to carry out a district-directed agenda grounded while empowering teachers and principals to solve problems and improve practice in ways that reflect the realities on the ground. By holding multiple perspectives, district-level teacher leaders are an integral part of managing the loose-tight approach to effective leadership of schools and districts.

Conclusion

As a district committed to both equity and excellence, Bellingham Public Schools strives to find the balance between district-wide priorities that generate coherence across the system and site-based autonomy and creativity that drive ownership and innovation at the school and classroom level. District-level teacher leaders – TOSAs and specialists – add important capacity to the central office to offer strong support for great teaching and learning. In conceiving of the purpose behind developing the team of TOSAs and specialists, I began with an initial notion that these district-level teacher leaders somehow “bridge” classrooms and central office. When I started, however, I did not have an operational sense of what that bridging act might mean.

Within the capstone timeline, the majority of the evidence I collected was related to the team’s development and its embodiment of the characteristics of effective teams. While this phase of work was essential, it served only as a prerequisite to achieving the desired impact of the team – providing coherent support for great teaching and learning. The data

available for analysis with respect to this impact, however, was limited within the allocated timeline.

Only in recent weeks, as the district office took stock of the year-to-date and used that analysis to begin making decisions about the coming school year, the influence of the TOSA/specialist team has become more evident, with an increasingly number of principals and teachers citing the TOSAs and specialists work as instrumental to managing the district priorities aimed at ensuring equity and excellence across the system. At the same time, directors and executives within central office have also publicly recognized the work of the team and have increasingly sought the team's opinions and perspectives. Serving as a voice for teachers, these teacher leaders are offering a ground-level perspective that takes the central office perspective into account, producing a more informed opinion. As the directors, principals, and TOSA/specialists collaborate together this spring to revise the current professional learning plan, it is increasingly likely that that plan will better reflect teachers' perspectives given that they have more champions advocating for them in those conversations.

The implications for site outlined in the preceding section are heavily focused on how the Department of Teaching and Learning should evolve in order to create more space for the valuable input of the TOSAs and specialists to be heard and acted upon. As a group, the directors have demonstrated their orientation to learning, particularly through the thoughtful revisions of their theory of action. They are up to the task of considering the recommendations as a means of making the whole DTL an inclusive set of instructional leaders that includes directors, principals, and teacher leaders. The director group is also dynamic; the less-hierarchical career paths promoted within the district (as mentioned above, the two-way movement between district-based and school-based leadership positions),

means that the current set of directors may change, potentially substantially, between now and next school year, and likely again in another year. This dynamism provides opportunities for dismantling old processes and setting up new systems. It also compromises the next-step learning that can come from the same group of individuals continuously tending to their theory of action by using experience to inform needed changes. Moreover, the TOSA and specialist team itself is subject to considerable changes, given the orientation of some toward full administrative roles and the budgetary nature of funding the positions on a yearly basis to be able to reassess where the greatest need is each year. This expected turnover will have its benefits – new ideas coming into the team – and its drawbacks – the need to build a trusting environment and catch new people up on the progress made this year. In capturing lessons from this year of development within the TOSA/specialist team, this capstone may provide helpful information that can link the learning from this year to inform upcoming plans, even when leadership and team composition have shifted. With a shift to internal leadership of the team, TOSAs and specialists themselves may be even better positioned to voice their perspective into the broader DTL conversation with directors and principals, rather than rely on their individual supervisors or me. While I am confident that most individuals will end this year with a sense of accomplishment, particularly those who had been in their district-level teacher leadership roles prior to this year, it will require commitment from multiple places to ensure continued movement forward.

While this capstone focuses primarily of the experience of developing a team of district-level teacher leaders within the context of a single school district and the anticipated impact on coherence across the system, the findings generate a body of additional work that could influence the sector. While the swinging pendulum of education reform may change

structures and processes, there is no expectation that the job of educating our children and youth will get any easier in the coming years. Our national commitment to educate all children to a high level will continue to place high expectations on the public education system. Capacity to meet that challenge will need to be drawn from every available corner. Teacher leadership will shift from being a buzzword to a must-have. And district-level teacher leaders, who are facile in both classroom and central office environments and can be leveraged to support the coexistence of the “loose-tight” approaches to education reform, will provide to be invaluable.

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Appendices

Appendix A: The Bellingham Promise

the Bellingham Promise

We, as a community, make a collective commitment to Bellingham's children. We will empower every child to discover and develop a passion, contribute to their community, and achieve a fulfilling and productive life. Board Policy E-1

We collectively commit that our students are cared for and respected, and that they will graduate from our schools prepared for success in the global community. Each will be exceptional in his or her own way, with strong character, a passion for learning, and ready for the widest range of educational and vocational options to support a diversity of life choices. Board Policy E-1



core beliefs

We believe:

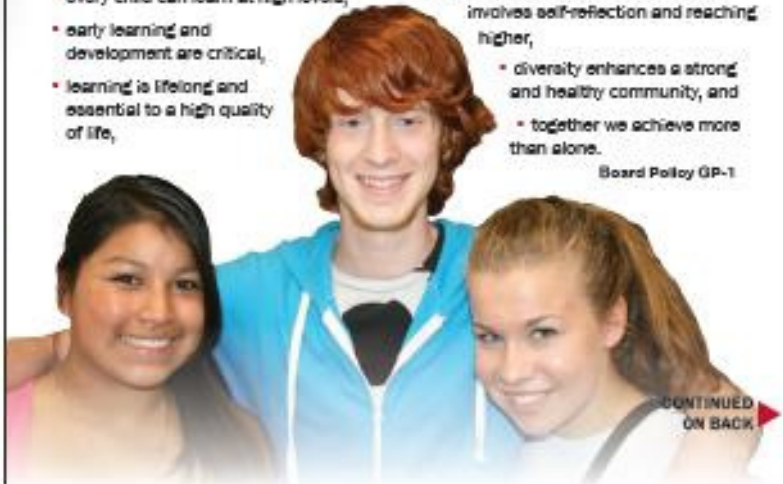
- all children should be loved,
- the whole child is important,
- every child can learn at high levels,
- early learning and development are critical,
- learning is lifelong and essential to a high quality of life,
- compassion and service build community,
- teaching children to do their best involves self-reflection and reaching higher,
- diversity enhances a strong and healthy community, and
- together we achieve more than alone.

Board Policy GP-1



1306 Dupont Street
Bellingham, WA 98225
(360) 676-6520
bellinghamschools.org

Updated January 2015



CONTINUED
ON BACK

outcomes

We develop students and graduates who are:

- | | | | | | |
|------------------|---|------------------|--|---------------|--|
| KNOWLEDGE | <ul style="list-style-type: none"> • readers and writers, • scientists and mathematicians, • historians and global thinkers, • artists, performers and trades people, • multilingual readers and speakers, • skilled users of technology and information, | CHARACTER | <ul style="list-style-type: none"> • leaders, collaborators and team players, • dependable and responsible workers, • confident individuals who continuously challenge themselves, • respectful and compassionate humans, • honest and ethical citizens who act with integrity, | ACTION | <ul style="list-style-type: none"> • healthy, active individuals, • critical thinkers and problem solvers, • effective communicators, • innovators and creators, and • well-rounded community members engaged with the broader world. |
|------------------|---|------------------|--|---------------|--|

Board Policy E-2, E-3



Strategic Planning

The Bellingham Promise emerged from an extensive community engagement process with staff at all 22 schools, the Student and Parent Advisory Committees, the Bellingham Public Schools Foundation Board, employee association leaders, and a variety of other parent and community groups. Thousands of comments were collected at meetings and through an online survey. Themes were identified from those comments and that feedback helped build The Promise. The Promise reflects our School Board's policy governance policies, which set desired outcomes for current students and graduates. The School Board meets regularly with parent, community and staff groups through linkages to gather additional input on our future direction. Every school year, school and district leaders use input to develop a work plan called *Priorities for Progress* that support the five key strategies of The Promise. This is also a living document that is continuously updated and improved based on feedback. It helps drive resource allocation through our budget process. Staff are currently working on how to share and gather evidence and measures of The Bellingham Promise in action with an emphasis on the whole child.

key strategies

We will accomplish this through:



School Board

- Kelly M. Bashaw
Director
- Douglas W. Benjamin
Director
- Cassille Dux Hackler
Director
- Keaneeth B. Gass
Director
- Steven H. Smith
Director
- Greg Baker
Superintendent and Secretary to the Board

Appendix B: Select TOSA Job Descriptions

BELLINGHAM PUBLIC SCHOOLS Bellingham, Washington

JOB DESCRIPTION

POSITION: 1.0 FTE Mathematics Teacher on Special Assignment

REPORTS TO: Director of Teaching and Learning

POSITION SUMMARY

Under the direction of the Director of Teaching and Learning the math teacher on special assignment is responsible for coordinating mathematics efforts that include professional development; providing building support for math teacher development; and the implementation of new math materials.

RESPONSIBILITIES

1. Provide leadership in professional development for implementation of mathematics content.
2. Implement district-wide PK-12 Mathematics Program: Support the alignment of curriculum and instruction by promoting curriculum articulation between grade levels and alignment of Math Common Core State Standards, (CCSS), including the Mathematical Practices.
3. Provide and facilitate building level coaching opportunities to support and sustain adopted curriculum and instructional strategies.
4. Assist in the development of mathematics curriculum interventions and extensions.
5. In collaboration with district grade-level or content-alike Professional Learning Communities (PLCs), facilitate the development and implementation of Common Classroom Formative Assessments.
6. Develop and coordinate professional development in the use of classroom-based district assessment data in informing instructional strategies to increase student achievement in math.
7. Collaborate with Curriculum TOSA Team in providing a coordinated comprehensive instructional support and growth program.
8. Participate in district and regional committees related to improving mathematics instruction and achievement.
9. Perform related duties as assigned.

QUALIFICATIONS:

1. Training and experience as an instructional coach and Bachelor's degree, Master's degree preferred.
2. Valid Washington State teaching certificate with mathematics endorsement.
3. Demonstrated successful experience teaching mathematics in an elementary and/or secondary setting.
4. Demonstrated deep content knowledge in mathematics, and knowledge of best practices in instructional strategies that are K-12 developmentally appropriate.
5. Demonstrated successful experience working with adult learners or experience in a similar position.
6. Demonstrated leadership qualities and ability to relate well and communicate with a wide variety of staff and administrators.
7. Have the ability to work independently in a fairly self-directed environment and a valid driver's license to provide ability to regularly work at a wide variety of district sites.

BELLINGHAM PUBLIC SCHOOLS
Bellingham, Washington

JOB DESCRIPTION

POSITION: Teacher On Special Assignment (TOSA) for Highly Capable Program (HCP)

REPORTS TO: Director of Teaching and Learning

POSITION SUMMARY

The HCP (Highly Capable Program) Teacher on Special Assignment (TOSA) is responsible for providing building support for teachers and students; assisting the directors of Teaching and Learning in coordination of program implementation and process. Assist with scheduling facilitators for training, professional development, and testing coordination of highly capable students and communication to families.

RESPONSIBILITIES

1. Provide leadership in professional development.
2. Provide mentoring and coaching for teachers in collaboration with the TOSA specialist's team.
3. Collaborate with site leadership teams implement the HCP plans at the building level.
4. Support growth of students by supporting teachers in using formative and summative assessment data, differentiation, and strategies to promote high levels of engagement.
5. Support the alignment of curriculum and instruction by promoting curriculum articulation between grade levels and alignment with common core state standards.
6. Participate in district and regional committees related to HCP and instruction.
7. Support the Director in program services, communication, development and monitoring of student progress.
8. Support district programming by assisting, coordinating and facilitating instructional delivery of extended highly capable programs.
9. Provide leadership with the parent advisory committee.
10. Perform related duties as assigned.

QUALIFICATIONS:

1. Minimum of two (2) year of training and experience as an instructional coach.
2. Knowledge and experience in best practice research for highly capable students.
3. Such alternatives to the above qualifications as the Board may find appropriate and acceptable.
4. Excellent communication skills.

5/20/14

Appendix C: Central Services Organizational Chart



Central Services Organizational Chart

Click on each department to learn more...



Department of Teaching and Learning Theory of Action

If we, the Department of Teaching and Learning, develop clarity about our individual and collective areas of primary work in support of the key strategies of The Bellingham Promise, and

clearly and consistently communicate what we do; and
commit to learning and working collaboratively; and
act on The Bellingham Promise to

- identify and understand the needs of principals/schools;
- provide differentiated, relevant coaching and support focused on principal and school needs;
- provide purposeful, effective professional learning focused on adult and student learning needs;
- respond to identified needs in a timely manner;

then, principals will be supported and enabled to be more effective instructional leaders, and teaching will improve resulting in increased learning and social/emotional development for all students.

Appendix E: TOSA/Specialist Team Characteristics

Position	Years in current position	FTE for District Role¹	Supervisor	Preferred Days/Time for Mtgs/Trainings
Literacy Intervention TOSA	1	.5	SK	PM
ELL Specialist	4	0	AC	After 10am
K-8 Literacy TOSA	4	1.0	MKC	Before 8:30am
Highly Capable Program TOSA	2	1.0	MKC	Mon
Data Specialist	1	1.0	BR	No preference
6-12 Math TOSA	1	1.0	CB	All
Literacy Intervention TOSA	1	.5	SK	PM
Highly Capable Program TOSA	1	1.0	MKC	Wed, Fri
Research & Assessment Specialist	3	1.0	BR	Not Mon
Special Education Compliance TOSA	1	.5	MH/BV	Tue, Thurs.
Behavior Specialist	1	1.0	MH/BV	
Special Education Compliance TOSA	1	.5	MH/BV	AM, Thurs.
Autism Specialist	3	1.0	MH/BV	
K-8 Math TOSA	1	1.0	CB	All
Tech Integration TOSA	1	1.0	KG	Tue, Thurs.
K-8 Literacy TOSA	4	1.0	MKC	Before 8:30am
ELL Specialist	4	0	AC	Fri

¹ FTE is Full-Time Equivalency and represents the portion of time officially allocated to district work.

Appendix F: Proposed TOSA Team and Role Sequence

Level	Departments and Support Staff				Curricular Areas						
	Staff	ELL	HCL	Title I	SPED	Read	Write	New Teacher	Math	Sci/SS	Professional Learning
ECE	1					<ul style="list-style-type: none"> Diagnostic asmt for early literacy Phonemic Awareness Start of year "looks like" 	<ul style="list-style-type: none"> p-3 Literacy Alignment Four Core Handwriting w/out Tears Word Study 	<ul style="list-style-type: none"> Bus tour Monthly meeting ½ day release 1x month classroom visit Mentor Website/binder Resources: <ul style="list-style-type: none"> -The First Days -Best Practices TOSA? 	<ul style="list-style-type: none"> Mathematical practices Needs assessment Best practice w/CCSS Steering committee? 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> School level data analysis to monitor growth of WAKids Environment
ELEM	2 TOSA	All areas ELL SPECIALISTS????	All areas TOSA	PK-5 TITLE I and LAP Teachers??Representatives?	All areas	<ul style="list-style-type: none"> Benchmark Literacy -Tightening whole group, small group, 1:1 -Independent reading Assessment -BAS -Progress monitoring -CFA/District Benchmark Video library Word Study Phonics K-2 Word study 3-5 	<ul style="list-style-type: none"> Four Core Workshop approach HWT 2-5? Cursive? Word Study 	<ul style="list-style-type: none"> Needs Assessment CCSS aligned rubrics Anchor papers 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> PLCs Lab Classrooms Word Study Curriculum Mapping 	
MS	2 TOSA			LAP		<ul style="list-style-type: none"> Intervention practices and resources Springboard Alignment Common Assessments BAS diagnostic Common Assessments BAS diagnostic(SPED/ELL) 	<ul style="list-style-type: none"> Needs Assessment CCSS aligned rubrics Anchor papers 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> PLCs 	
HS	2 TOSA			LAP		<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> PLCs 	
V1						PLC Training, TPEP with SD, Weekly "Deliverable" Meeting, 1x a month (½ day learning, ½ day growth data), PD: Effective T&L, Facilitation Strategies, Change process and systems work, Possibly including ELL Specialists, Title I/LAP team, a few classroom teachers?					
V2						Continue above and professional learning foundation					
V3						Overlap group PHASE 2 TOSA Release					
V4						Original TOSAS back to classrooms, PHASE 2 TOSA out of their classroom					

Turning to One Another

There is no power greater than a community discovering what it cares about.

Ask “What’s possible?” not “What’s wrong?” Keep asking.

Notice what you care about.

Assume that many others share your dreams.

Be brave enough to start a conversation that matters.

 Talk to people you know.

 Talk to people you don’t know.

 Talk to people you never talk to.

Be intrigued by the differences you hear.

 Expect to be surprised.

 Treasure curiosity more than certainty.

Invite in everybody who cares to work on what’s possible.

 Acknowledge that everyone is an expert about something.

 Know that creative solutions come from new connections.

Remember, you don’t fear people whose story you know.

Real listening always brings people closer together.

Trust that meaningful conversations can change your world.

Rely on human goodness. Stay together.

Margaret J. Wheatley

From *Turning to One Another: Simple Conversations to Restore Hope to the Future*

Appendix H: TOSA/Specialist Team Theory of Action Drafts

1. If we, the TOSA/Specialist team, identify professional learning needs based on students' achievement, teachers' input, and administrative priorities, and provide differentiated support;

then teachers will be empowered to refine their practice, and teaching will improve, resulting in increased learning and social/emotional development for all students.

2. If we, the TOSA/Specialist team, develop clarity about our individual and collective areas of primary work in support of the key strategies of The Bellingham Promise,

and establish ourselves as a collaborative team, and clearly and consistently communicate what we do for teachers, students, principals, counselors and district level colleagues, and act on the Bellingham Promise to

- Prioritize the work of the team
- Identify and understand the needs of teachers and students
- Support teachers with high quality and relevant professional development
- Follow up professional development with just in time coaching
- Provide differentiated support focused on teacher and student needs
- Respond to identified needs in a timely manner;

then teachers will be supported and enabled to be more effective instructors, and instruction will improve resulting in increased learning and social/emotional development for all students.

3. If we, the TOSA/Specialist team clarify/define/unpack common foundational understanding around the instructional framework and how we use it, identify and understanding the needs of teachers and students (using data including surveys, observations, and teachers' areas of focus), and provide a variety of whole group, small group, and individual professional development linked to the Instructional Framework and teacher-based inquiry;

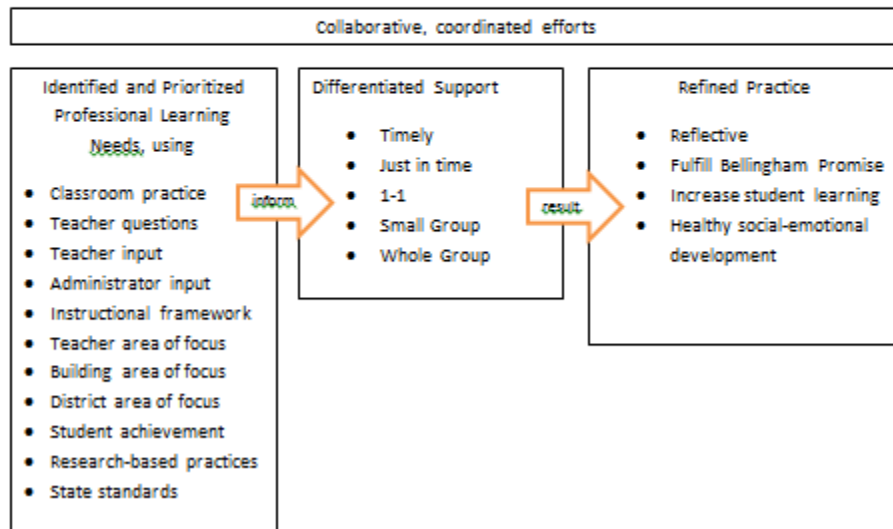
then student learning needs will inform classroom assessment and planning

Draft - December 1, 2014

DRAFT: Theory of Action

January 26, 2015

If we, the TOSA/Specialist team, collaborate to provide differentiated support based on identified and prioritized professional learning needs, then teachers will be empowered to refine their practice, resulting in increased learning and social-emotional development for all students as envisioned in the Bellingham Promise.



Appendix I: Special Education Specialist (TOSA) Job Description

POSITION: SPECIAL EDUCATION SPECIALIST (TOSA)

REPORTS TO: DIRECTOR AND ASSISTANT DIRECTOR OF SPECIAL EDUCATION

POSITION SUMMARY:

The Teacher/s on Special Assignment (1.00 FTE) is responsible for providing technical assistance and coaching to district certificated and administrative staff in the area of special education legal compliance and program development on an individual, school, and/or district team basis.

RESPONSIBILITIES:

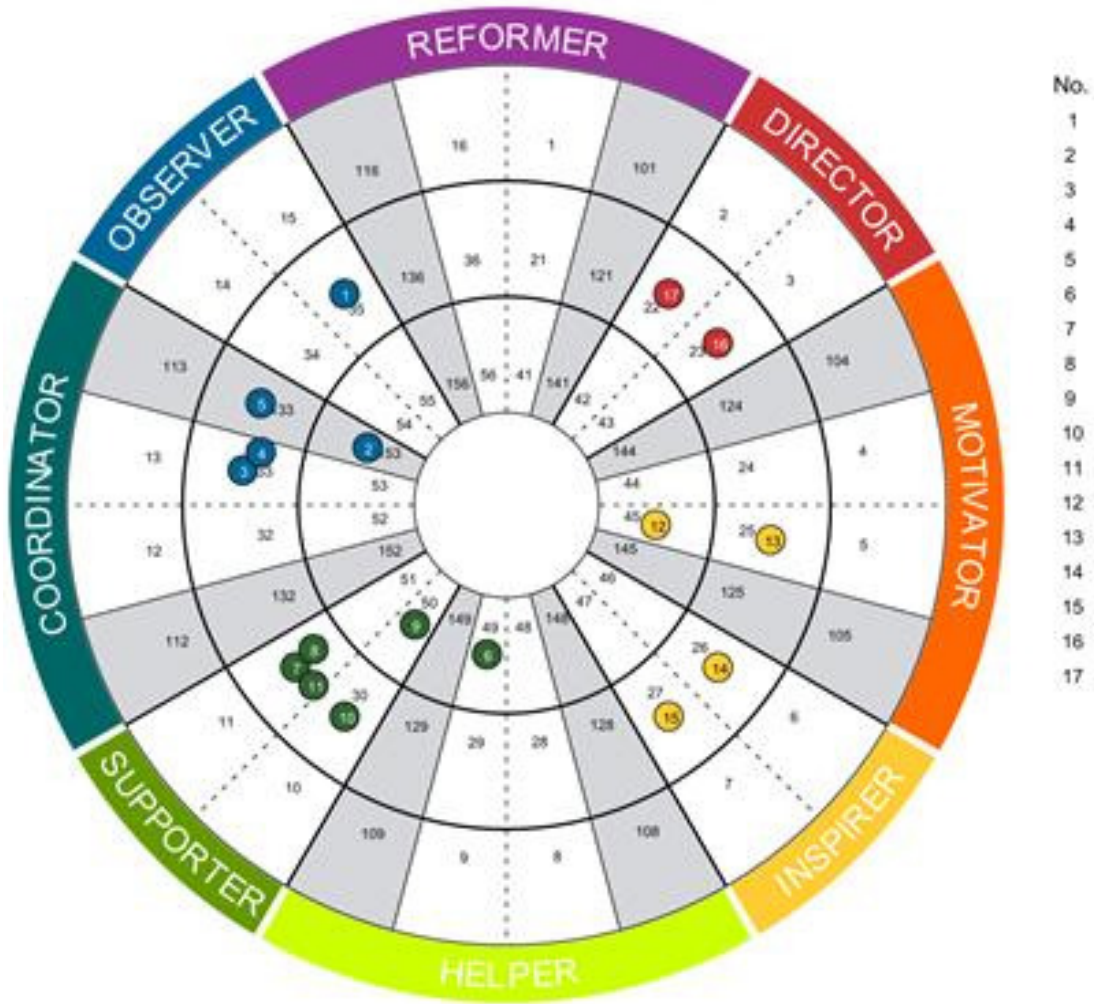
1. Review and analyze district special education compliance data.
2. Review individual student files to identify trends for potential non-compliance with IDEA and other legal requirements.
3. Coordinate with director and assistant director to develop and deliver professional development in identified areas of need.
4. Coordinate and/or provide direct mentoring to teachers, support staff, and administrators in the Referral, Evaluation, and IEP processes.
5. Provide technical assistance to staff in the application of the federal laws and state regulations.
6. Work with staff and district resources to develop and compile an online resource manual for staff and parents.
7. Perform duties, tasks, and responsibilities related to the program as requested by the director and assistant director of special education.

QUALIFICATIONS:

1. Prefer currently contracted Bellingham School District special education teacher with a demonstrated record of at least three (3) years of successful special education teaching experience.
2. Valid Washington State teaching certificate with endorsement in special education.
3. Special education teacher with successful middle or high school experience preferred.
4. Special education teacher with a demonstrated record of knowledge of IEP transition plans and district procedures.
5. Training and experience as an instructional coach preferred.
6. Demonstrated leadership qualities and ability to relate well and communicate with a wide variety of staff, parents and guardians, advocates, and community partners.
7. Demonstrated knowledge of federal laws and state regulations and application of the requirements in daily practice.
8. Demonstrated ability to design, develop, implement, and monitor progress of Individualized Education Plans (IEPs). Skilled use of IEP.Online.
9. Ability to coordinate, implement, and document program requirements.
10. Knowledge and experience using assistive technology in the delivery of curriculum and instruction.
11. Ability to work a flexible schedule to accommodate meetings with teachers at all grade levels.
12. Such alternatives to the above qualifications as the Board may find appropriate and acceptable.

The Insights® Team Wheel

Bellingham Public Schools





[Type the document title]

We collectively commit to...

Building Trusting Relationships

- We will have confidential and honest conversations
- We will manage conflict and challenge respectfully
- We will give candid but kind feedback and expect the same from others
- We will assume best intentions
- We will take risks and make the environment safe for risk-taking

Working Collaboratively

- We will use the Bellingham Promise and the 5D instructional framework to frame our work
- We will all contribute actively to the team, including building agendas and facilitating meetings
- We will be aware of our speaking time, seek to engage everyone, and allow adequate discussion time
- We will consider how our work impacts the team and others throughout the district

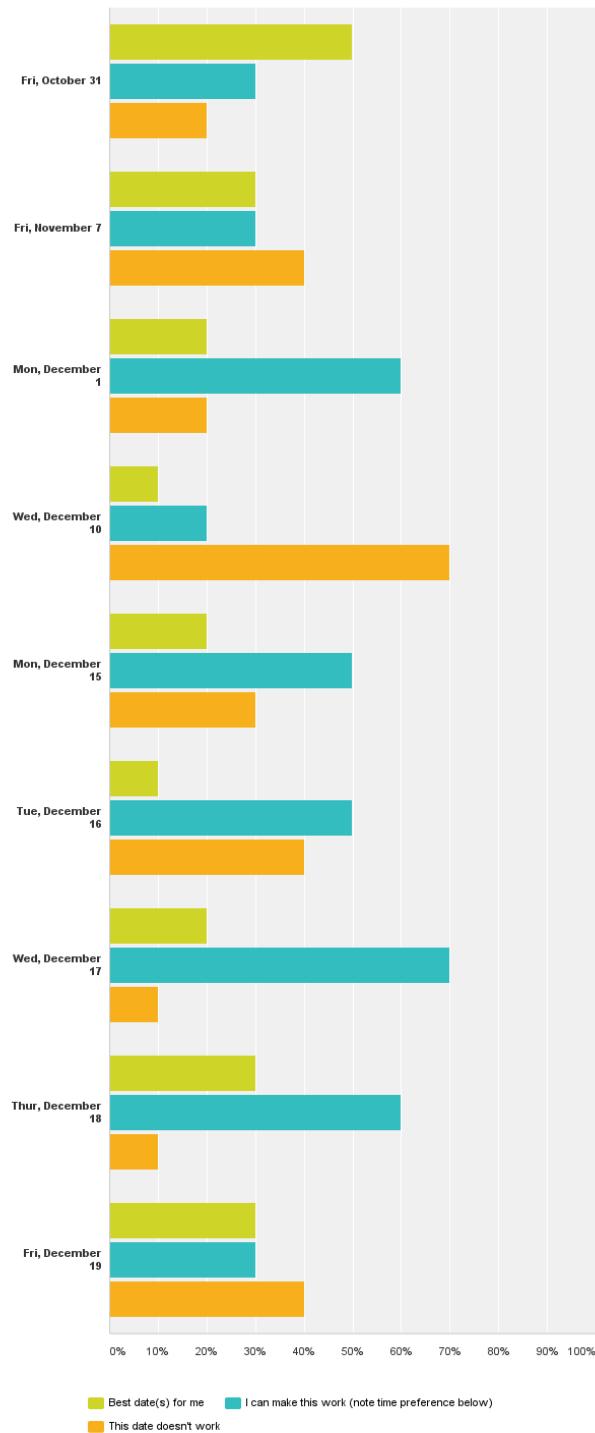
Bringing Our Whole Selves

- We will begin and end on time
- We will be present - physically and mentally - to fully engage with the work in front of us
- We will listen first, ask each other questions, and strive to understand

Appendix L: Extended Time Survey Results

Q2 Which of the following dates would work for you? We are thinking of a half-day for these meetings. Based on your responses below, we will follow up to schedule a specific time.

Answered: 10 Skipped: 0



Appendix M: Sample TOSA/Specialist Team Meeting Agenda



Team Agreements: *We commit to **building trusting relationships, working collaboratively, and bringing our whole selves***

Pre-Meeting Prep

1. *Think about one area of work where you could use help from a member of our team – this will be part of our opening session on Highs and Helps.*
2. *Watch [facilitation video on Tcb](#) and post your observations. Be ready to analyze the facilitation as a team on Monday.*

Location: District Office, Rm 205

Facilitator: Anda

Time Keeper: Andrea, Beth, Brian, Charlotte, Chuck, Dawn, **Janie**, Katie, Maria, Pam, Stephanie, Susan

Norms Monitor: Anda, Andrea, Beth, Brian, Charlotte, **Chuck**, Dawn, Janie, Katie, Maria, Pam, Stephanie, Susan

Notes: Kris

Learning Targets & Success Criteria

We are growing as a team by understanding how the mix of complementary skills strengthens our work together.

We will share celebrations and acknowledgments of others on our team.

We are developing a meaningful common purpose through understanding the individuals who are part of our team.

We will assess our own preferences for group work and understand how these preferences affect our group work.

We are developing a strong commitment to how our work gets done.

We will continue our online discussion of PD facilitation to develop our collective understanding of this work.

7:30 am Growing as a Team

Highs and Helps – Briefly, what went well this past week, what is one thing you could use some help with?

7:45 am Understanding Individuals as Part of Our Team

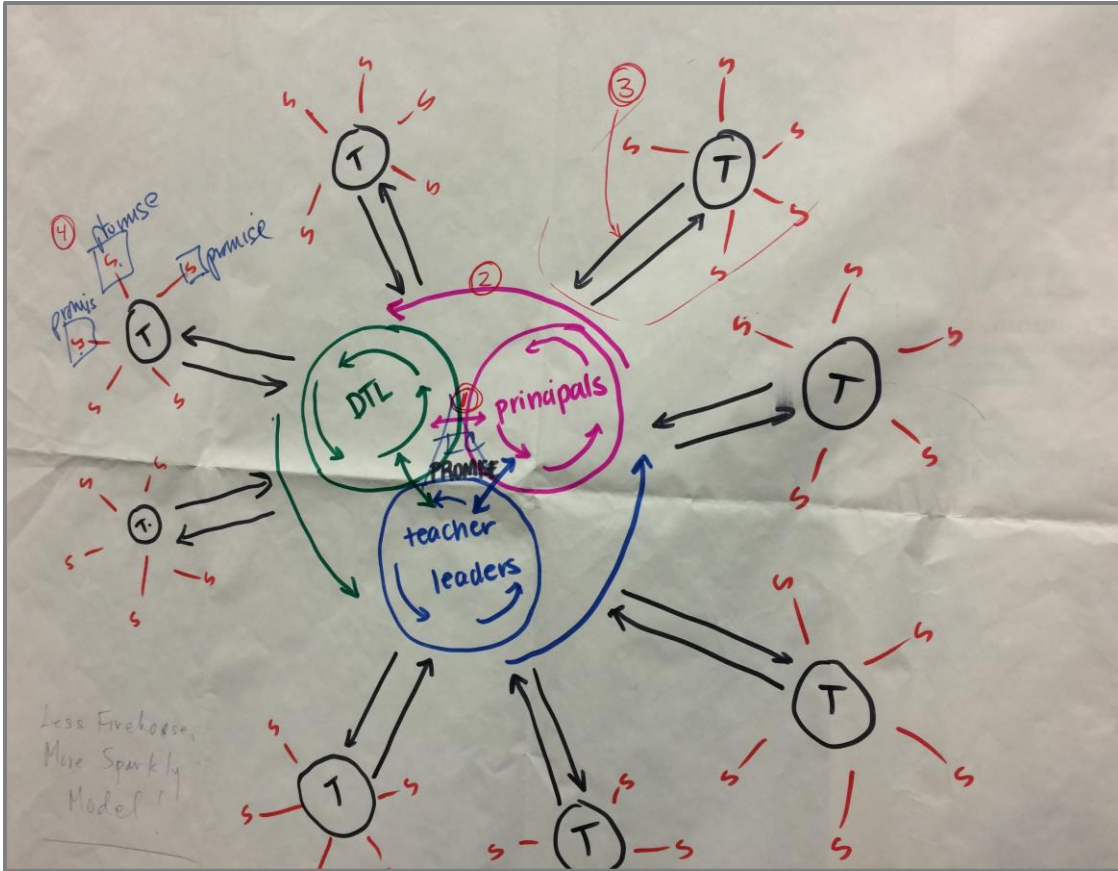
Assessing our individual preferences for group work and understanding how they affect our group work.

8:15 am How Our Work Gets Done

Facilitation video on our Tcb Teams platform: building on our online discussion through analysis and question generation

8:40 am Check Out

9:00 am Optional: Team Discussion on Communication with Teachers (Janie and Brian)



*****Draft*****

DTL Theory of Action revisited.....

If we believe in strengthening the instructional core of student, teacher, and content, and view ourselves as instructional leaders together with principals and teacher leaders; and,

If we engage with principals and teacher leaders to hone a vision of shared instructional leadership, as we collaboratively engage in continuous inquiry into practice; and,

If we relentlessly strive for instructional improvement, and learn from our work in schools through reciprocal use of evidence/data; and,

Then teachers will continue to develop outstanding instructional practices that support students learning as embodied by the outcomes of the Bellingham Promise.

Endnotes

¹ In her 2012 *Educational Administration Quarterly* article, Honig references the use of Master Teacher Leaders (MLTs) in Atlanta, where Instructional Leadership Directors frequently used teachers with instructional expertise to work directly with teachers as a means of providing extra support to principals. These MLTs sometimes supported principals more directly by modeling instructional leadership in staff meetings and feedback conversations with teachers.

² This location is notable because there were early discussions that, due to the increased size of the team, the whole group would be moved to an offsite location (a decommissioned early childhood center), which is 3 miles from the district's central office and which did not contain any other district offices.

³ It should also be noted that while most TOSAs are typically not needed in schools on the first day of school, specialists associated with student populations like Special Education and English Language Learners are often more needed for support during these transition times so, depending on the composition of the team, the first day(s) of school could be additional training and team building time.

⁴ The 30 hours are calculated as the team's regular meeting times on the first, third, and fourth Mondays of the month. There have been additional 35 hours from 5 full-days of training on the instructional framework and learning-focused relationships that have involved directors along with TOSAs and specialists so are not counted here as TOSA/specialist team development time.

⁵ This collaboration fund would not replace the professional learning that is currently supported by budgets for specific content areas. It would be specifically focused on encouraging cross-disciplinary work among the team members.

⁶ Teach to Lead was launched in partnership with the National Education Association's Teacher Leadership Initiative, the American Federation of Teachers' Raise the Bar, and the National Board for Professional Teaching Standards