LEAD TEACHERS IN COLLABORATIVE ACTION RESEARCH: PERCEPTIONS OF ROLE AND RESPONSIBILITY

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ABSTRACT

In 2008-09, the Elementary Teachers’ Federation of Ontario (ETFO) sponsored a professional learning initiative entitled, Teachers Learning Together: The Math Journey (TLT-Math). The context for teachers was one of team-based, collaborative action research (CAR) dealing with a mathematics topic of their own choosing. University researcher teams in provincial regions were also enlisted to facilitate the CAR activities and to conduct case study research and reporting. Each teacher team designated a Lead Teacher (LT) for the duration of the project. This paper highlights the case study research findings pertaining to perceptions of role and responsibility of the LTs, and focuses on four emergent roles, namely that of manager, motivator, model, and mediator. Lead Teachers are shown to be essential to the collaborative action research process. Notwithstanding, recommendations regarding the actual LT designation, and a clearer communication of LT role and responsibility are also made.

INTRODUCTION

In 2008-09, the Elementary Teachers’ Federation of Ontario (ETFO) sponsored a professional learning initiative entitled, Teachers Learning Together: The Math Journey (TLT-Math). The context for teachers was one of team-based, collaborative action research (CAR) in a mathematics topic of interest to the group. Elementary teacher teams from across the province submitted proposals to ETFO in the spring of 2008, outlining their school and teacher participant contexts, their team’s mathematics focus, and an initial draft of the research question they wanted to explore over the coming year. Within the application, a “Lead Teacher” (LT) was to be identified for each teacher team as someone
who would represent their team, and who would also receive additional release time to attend a number of Lead Teacher events throughout the year. Selected teams were to be provided with resources and release time in a context of team-based professional decision making. Throughout the province, university researcher teams were to serve as knowledgeable mathematics education and action research facilitators for all teacher teams assigned to them by ETFO, and to produce case study reports describing outcomes for each time and across CAR teams.

Lead Teachers (or Team Leads, as referred to by some university researcher teams) came to the role in a variety of ways: some volunteered, others were asked to assume this role by administrators or by colleagues, some were returning for a second cycle of the ETFO initiative, and still others were not aware of this commitment until the first central gathering of the teacher teams in summer 2008. This paper documents the perceptions held by Lead Teachers and by fellow team members of the roles and responsibilities of Lead Teachers within the collaborative action research process.

**Theoretical Framing**

Collaborative Action Research (CAR) involves systematic inquiry where educators and researchers engage in identifying educational issues of mutual concern, design interventions (often classroom or instructional interventions), and implement these interventions while collecting data on effects (Bruce, Flynn, & Peterson, in press; Capobianco, 2007; Du, 2009; Ross, Rolheiser, & Hogaboam-Grey, 1999). CAR involves taking action with an eye toward educational improvements such as enhanced student and teacher learning. This collaborative process has been identified as a key strategy for developing teacher leadership (Frost & Roberts, 2004; Harris & Muuijs, 2005, 2006; Smeets & Ponte, 2009). We see teacher leadership within the context of CAR as a situated activity (Spillane, Halverson, & Diamond, 2004) where there are multiple forms of leadership and multiple leaders within the team. Rather than simply connecting leadership to a function of an individual's title, the complexities of leadership in CAR can be better understood as a distribution of leaders based on the situation. Building on Spillane's work, Margolin (2007) describes distributed leadership as “a network of interaction among individuals which offers an open definition of leadership borders, and expands the conventional network of leaders to include many people” (p. 539). Further, the CAR process demonstrates the potential to increase interpersonal capacity by supporting participants in forming and sustaining collaborative relationships (Mitchell & Sackney, 2000) rather than engaging in 'contrived collegiality' (Hargreaves, 1991).

In our Collaborative Action Research work, team leads were identified by the team in order to practically facilitate the ease of communication amongst members of the team and researcher partners. Overall, the three legs of the leadership stool for our CAR study can be understood as (i) designated team leaders, (ii) participants (who were also leaders in situ), and (iii) researcher facilitators (who were also leaders in situ). In this paper, we focus on the role of the designated Lead Teacher to further explore how this identified team leader both accepted leadership opportunities for themselves and enabled leadership opportunities for other team members.
**METHOD**

*Data Collection*

Both teacher teams and researchers gathered data during the collaborative action research process. Ethics approval for all forms of data collection was provided through the appropriate permissions established with each of the participating district school boards for the ETFO project, as well as that granted through the research ethics boards of the two universities in which the co-authors were employed. The teacher researchers collected student work samples; field notes of observation using focused observation guides; tallies; photographic and video evidence; and, teacher journal entries. The University researchers collected samples of teacher journal entries; transcripts of focus group interviews as well as Lead Teacher focus group interviews; video footage of classroom interventions; field notes from meetings with school teams; interim and final reports from each school team; and, records of communication between school teams and university researchers (e-mail correspondence, telephone conferences, face-to-face visits and meetings).

Lead Teachers experienced several additional meetings/events throughout the school year: (i) during the centralized summer 2008 introductory days in Toronto, LTs met separately with the university researchers to take part in baseline focus group interviews and to complete a brief written survey; (ii) LTs were invited to attend special funded sessions throughout the year (e.g., in two Ontario regions, LT’s were asked to attend a 1-day session in February, and another 1-day session in May) at which they again participated in focus group interviews; and, (iii) in some cases, eJournals were also collected throughout the year, with specific email questions being asked to the LTs by the university researchers.

*Data Analysis*

The university researchers had at least 20 data points for each team, with more than 30 points of data to analyse for each case study team. In stage one of analysis, researchers generated a set of start codes from sample data of each type. All data were coded, and when necessary a new code was generated. In the case of new codes, all data were reanalyzed to account for the newly introduced codes and to ensure saturation (Creswell, 2011). In stage two of analysis, we generated a case study report (Yin, 2008) for each team identifying the process the team followed as well as the outcomes for teachers and students. In stage three, the university researchers generated typologies (McKernan, 1989) that enabled us to look for common features as well as contradictions in terms of the nature of the teams, the nature of the projects, and the related conditions or attributes that led to successful and robust collaborations among teacher researchers and among teacher researchers and university researchers. The Lead Teacher was a key feature of the typology, leading the university researchers to see the Lead Teacher role as central to success of each team. Data from fourteen teams were entered into a typology matrix so that, in a fourth stage, we were able to conduct a cross-case analysis.

In terms of the specific analysis relating to Lead Teacher role/responsibilities, [university researcher] (Nipissing University) and [university researcher] (Trent University) were both involved in separate university research teams in north-eastern and south-eastern
Ontario regions, respectively. Together, they co-designed the original baseline focus group interview schedule, and then later met to begin analysis of the various forms of Lead Teacher data following the submission of the final teacher/researcher reports to ETFO. The matrix used earlier for cross-case analysis was then expanded to include the focus group and eJournal data related to the Lead Teacher role and responsibilities. Research assistants, [RA] and [RA], completed the expanded templates for each Teacher Team highlighting powerful quotes from the various data sets and focusing on the following five descriptors: (i) Role of LT, (ii) How one became a LT, (iii) tasks undertaken by the LT, (iv) perceptions by others of the LT, and, (v) impact of the LT on self-reported success of the team. [University researchers] then analyzed these completed templates and further agreed upon the four most dominant themes pertaining to the perceived role of the LT. What follows are descriptive characterizations of, and commentary relating to, these four LT roles, supported by LT quotations (with pseudonyms) where appropriate.

**Research Findings**

The four main themes related to Lead Teacher roles and responsibilities across the fourteen Collaborative Action Research cases sites were: Lead Teacher as manager, motivator, model, and mediator. Each of these themes merits illustration and discussion.

**(i) Lead Teacher as Manager**

One of the main reported roles of the Lead Teacher was that of manager, contact person, or organizer for the team. According to LTs, this role encompassed both the planning of meeting dates and content, as well as the planning and tracking of research questions and data collection as per the team-selected action research focal topic/strategy.

**(i) Planning Meeting Dates, and Location**

Many of the Ontario teacher teams involved in the ETFO initiative were located entirely within one school building; however, some teams were comprised of teachers from several different schools, at times even spread out over an entire region. Both contexts, the single- and multi-school teacher team situations, featured certain reported affordances and challenges. For example, Amber was part of a CAR team located within one school (majority in one hallway), and noted the benefits:

*Amber:* Four of us are in the same hallway together, so we see each other daily. This allows for quick checks, informal chats, etc. The fifth teacher is in a different part of the school so we see her less frequently for this type of casual chatting. . . . I confirm each meeting date/time/place as it approaches, and discuss with the other group members what we will be doing at that meeting. However, our group functions with minimal leadership—we discuss, share, disagree, etc. as a group of individuals with a common purpose. . . We talk with each other very frequently, so we were always up to date regarding how things were going. Most of our contact was informal, but it was frequent.

Britney’s experience was quite different, as she was part of a CAR team located at four different schools spread out across a large urban centre in Ontario. What follows are four
comments made by Britney throughout different stages of the academic year. Note the different emphases, as she discusses both the challenges (geography/isolation/direct synergy) and the affordances (lack of “baggage”/diverse contexts and perspectives) that she felt were part of a multi-school context.

**Britney (beginning of CAR cycle):** We’re not starting with any baggage—where one is working with a group of teachers who have already worked together there is a certain amount of baggage, so perhaps that will even be easier than I had anticipated it would be.” Then,

**Britney (early in CAR cycle):** I think that my role hasn’t changed tremendously, and I think it probably has to do with the dynamics of our group and our geographical locations. I think if we were in the same building . . . there would be more of a shift [in pedagogy]. I think I’m still kind of the glue that holds the group together . . . We are five teachers from four different locations . . . [but] we all came into this with a similar mindset. We all wanted to be a part of the group.

**Britney (late in CAR cycle):** So, logistically . . . that certainly was a problem. Determining where to meet because it’s such a distance. . . . The makeup of our schools is very different. We have a school that’s a brand-new...a state-of-the-art school that has a mixture of populations in the suburbs. We’ve got an inner-city school which has a huge multi-cultural population and a lot of poverty. It sits right on the edge of a housing development... And then a very typical suburban school on the other end where there is a lot of parental involvement... Having said that, and seeing that as sort of negative, it really leads to very rich discussions and conversations among our group when we meet, and a huge point of professional development for all of us because we get to see a different perspective. . . . But I think they would welcome having somebody else in their school involved, so that they would have someone to talk to immediately and somebody sort of following the same path.

On the other hand, one team working across multiple small rural school sites spanning 100 kilometers found working with colleagues of the same grade (which was not possible in their own school site) highly productive. The Lead Teacher for this team saw her management role largely in terms of communication amongst team members, but she was also able to travel from site to site to work in the classrooms with the other team members:

**Melissa:** Our group’s more spread out, because we’re not all at one school. And then there’s also another coach. So communication is a big part, just in terms of the emails and that kind of thing, making sure everybody has that. A contact person, housekeeping sort of thing. I’ve also sort of played the role of sometimes finding and sharing of articles or if somebody else finds something, then I’m looking after the copying, again, just logistical I guess. Also though, I see myself as a member of that group, so, during discussions and things, it’s just one more person to ask questions or to do things. And then, a role I think I’ll be moving
into a little bit may be sort of that partner in class, because our people are spread out and I’ve had a couple of people take me up on that. I’m very excited.

All of the LTs involved in the project, without exception, noted that one of their main roles was to organize and manage their team, insofar as planning meeting dates, locations, and content.

**Halle:** Just organizing and coordinating because even if you’re at the same site—everybody getting together, and everybody being in the building on the same days is not always happening. Probably the lead on a lot of things, like really very literally—they kind of wait for me to talk about what’s going to happen next. They all jump in once we’re doing it and everybody participates, but in terms of an agenda for the meeting, or knowing when the meeting is going to be—all of that kind of stuff, coordinated with the principal and the Board, goes through me. Not because I love that role but because somebody has to do it.

Part of the manager role also included maintaining communication with ETFO organizers, university researchers, district school board coordinators, school administrators, and also between members of the teacher team. This was often done by email/phone, but also in person. As Halle noted, “I have worked with the team and the school to select and set up the release dates, and I serve as the go-between for [university researcher] and the team.”

**(ii) Planning and Tracking Research Questions, Data Collection, and Report Writing**

Lead Teachers not only managed meeting particulars, but also were heavily involved in planning and tracking the action research questions, related data collection activities, and report writing. Lead Teachers were often involved in writing the original team action research proposal and submitting this application to ETFO. Preparing this application obviously involved the establishment of the team’s participant list, and at least a general sense of its research focus.

**Erica:** My role initially was writing the proposal with another colleague and finding a diverse range of members for the team. Since the beginning, my role has focused more on the administration portion of the team.

Some LTs were also involved in revising their team’s research question(s), if necessary, in selecting/modifying data collection methods/tools, and in organizing the data for analysis.

**Amber:** We felt uneasy about our project question, and after sharing the same conversation a few times, we agreed we needed to change our question! . . . I, along with two of my peers, convinced one of the other two members to agree to test our whole class, and not just a handful of the kids. The final teacher has a split class, and I think she’s testing one of the grades. This seems like a reasonable compromise. . . . I think I also see my role as always keeping in mind the timelines—being goal-oriented and setting small chunks that we’re going to
work on, one at a time, then checking back saying, "We’ve checked that off, we’ve done that, now what are we doing next?"

**Erica:** I am also involved in working with the school improvement team at our school this year, which enabled me to create a link between our action research project and our goals for school improvement. Our proposal regarding problem solving is embedded within one of our goals for the school this year. . . . I provided minutes of meetings, data collection timelines, and data collection forms.

Managing the progress of a teacher team also often fell to the Lead Teacher, as s/he felt responsible for ensuring that goals would be accomplished, and that reports would be written.

**Amber:** I offered support in taking care of lots of the typing of our data and our report. I’m a fast typist, so this was related more to that than to being the “leader”!

For some Lead Teachers, there was an increasing opportunity to support their team members during data collection:

**Juanita:** I think at the beginning for me it was more, just organizing everybody and getting everybody on the right track of what they’re thinking was about the question and what we had to do. And now I’m seeing myself more as, I’m going in, and whatever classroom is doing, like videotaping or audiotaping or observation, I’m in there doing that for them while they’re doing the lesson and interacting with the kids.

Part of the role of managing a teacher team included the establishment of a positive and trusting environment among participants, so that meetings and research-related activities could be experienced within a climate of mutual respect. Lead Teachers, as such, also functioned as team motivators.

[II] **Lead Teacher as Motivator**

A second major role of the Lead Teacher that emerged from the data was that of individual and team motivator. This involved the establishment of a positive space for member interaction, balanced with a series of friendly reminders and occasional prodding and pushing for results.

**(i) Building Trust and Encouraging Team Members**

Building a network of trust and mutual respect among a group of people is a demanding and time-consuming process. For some teacher teams, professional learning networks, and social networks, had already been established. For other groups, the *Teachers Learning Together: Math Journey* represented a completely new social grouping, some even meeting each other in Toronto at the opening event for the first time. Still other groups knew each other by name or proximity in the school or board, yet had never had the opportunity to
really get to know each other through working together on a shared project. LTs facilitated trust-building consistently through their enthusiasm and encouragement but also importantly, by taking risks themselves and by listening carefully to their team members.

**Jordan:** I am enthusiastic and not afraid of change. I think others respond to this and are willing to take some risks alongside me. I am reflective and work hard to understand the point of view of others. I think this was important in this project especially because we were working from different levels of experience and different comfort zones.

**Ilsa:** I think that I’m enthusiastic and positive, so that sort of goes well within the group, so I try to keep things going and moving on a positive, rather than dwelling on the negative. I like to say, “Okay, what is working?” and then go from there. And I think I do listen well to my colleagues and really try to hear what they’re saying—because I do go in with my own ideas, and what I would like to happen, but I come out thinking that what other people said is just as valuable... . We need to work together for it to really work.

University researchers also offered specific professional learning for the team leads early in the CAR cycle specifically on the topic trust building to support LT efforts in this area. The following nine actions for developing trust with one's team, for example, were discussed by nine Lead Teachers at a Lead Teacher meeting:

1. Follow through on commitments;
2. Meet deadlines;
3. Trust begets trust: Trust others and they will trust you;
4. Give all the information you have, honestly;
5. Empower others by allowing for collective decision-making;
6. Resolve conflicts early by exploring alternatives;
7. Respect the differences in people;
8. Show personal integrity; and,
9. LISTEN.

To be truly effective as motivators, these “enthusiastic cheerleaders” indicated that they must also possess and/or develop the ability to challenge their colleagues by listening, asking good questions, and facilitating deep discussions around teaching practice and research methods.

**(ii) Challenging Team Members to Push Boundaries as Teachers and as Researchers**

Another aspect of motivation was the ability of some LTs to successfully convince team members that they were capable of trying new things as both teachers and classroom action researchers.

**Erica:** I already work in a co-teaching relationship with many staff members and they always talk about the importance of building relationships with children. The same thing goes with adults. If you really want to move people
forward you have to build a relationship with them, and then you can kind of force them out of their comfort zone and a lot of more interesting things come out then. . . . They really have to know that you’re on their side, that they can trust you—that you’ll support them in whatever way is necessary.

Often the challenge started with opening classroom doors to one another:

**Jordan:** We went in to observe each other, help each other complete our observation sheets and then that’s when you see the kid who’s looking at you…or you see the kid who…when I was observing in Mae’s room, she was observing her target kids that she’s studying, and I was went around, and some of her…there’s a couple of boys who tend to do really well in math and I was able to observe some of their strategies for her, just for her own classroom assessment. So I was giving her some little notes after she was done. So that’s the kind of exciting thing that you tend not…you know it’s really good for you, but again, it’s that thing that you know you should be doing, but you tend not to.

This new sense of openness was followed by attention to the mathematics content in the classroom:

**Halle:** And there were lots of excuses—it’s a real fear of stepping into the unknown and taking that risk. But when it comes down to it, I think the more we talk—a more common theme now is the missing [mathematics] content knowledge. People are feeling more comfortable to say, “I don’t know.” Before, people didn’t know, but . . . they weren’t comfortable enough to say it, but I think that that’s really coming out more and more. . . . One thing that made it really obvious by the last meeting was when we talked about, “What could we do next time?” two people volunteered to have the lesson in their room. First of all, that never would have happened at the beginning of the year. They would have just swatted you right out and said, “I’m not doing that.” . . . When two people volunteered to have it in their room, I just thought that spoke volumes to where people were at: Even now, just the honesty, and the collaboration, and the group cohesiveness.

Lead teachers also pressed for broad and deep reflection during team meetings:

**Lorraine:** I think as team leader… I try to broaden thoughts, ideas and concepts—maybe play the ‘devil’s advocate’ sometimes to try and get more ideas out there.

The pushing of boundaries through risk taking combined with trying new strategies in the classroom was reported by Lead Teachers to be a catalyst for increasing teacher confidence levels.

**Melissa:** If someone was to try that for the first time without that kind of support and you know, it bombs, and they say, well, I’m not doing that again. . . .
I think it’s so valuable in terms of confidence, because I’ve seen that with all of us in our group—just that working together and reading about it and trying it and supporting each other, has made the confidence grow, both in problem solving and in the content for what we’ve focused on, and those things are huge.

Lead Teachers functioned as challengers of their respective team members, through trust-building, risk-taking, listening, and encouraging the opening of classroom doors. These actions resulted in increased confidence, mathematics content learning, and in efforts to attempt risky interventions that supported student learning in mathematics.

[III] Lead Teacher as Model
Despite their commonly shared desire to be an equal team member and to not stand out as a special or privileged member of the team—an important point that will be more fully considered towards the end of this paper—some Lead Teachers did function as models for their fellow team members. Two particular types of modeling were noted in the interview data, namely, the modeling of action research methodologies (pacing/expectations), and the modeling of instructional practice (problem-based learning) in keeping with the mathematics reform agenda (NCTM, 2000).

(i) Modeling the CAR Process
A number of teachers and Lead Teachers were experiencing the 2008-09 ETFO initiative as the second year of the professional learning cycle, having already completed a similar action research project with ETFO in 2007-08. As such, these particular Lead Teachers with the benefit of prior experience were experienced in providing guidance to their respective teams in terms of research expectations and methods, as well as team pacing in light of deadlines.

**Jordan:** Beginning way back last year, I was the ‘go to’ person for everything in our project. The team lead meetings were so important because they allowed me to hear from other leads and get direct support from experts in all areas: research and the nuts and bolts of the project from ETFO. This year, my role was less up front. Our team now knew what was involved. I was there to take the lead when we had trouble shooting to do, to initiate conversation and reflection throughout the process and finally as a contact person for the administrative duties. I must stress, that in our team, we all took on various leadership roles this time. When working independently of each other, we were confident in what we were doing and this led to rich discussion when we were together.

(ii) Instructional Practice Modeling
A second type of modeling that took place, as noted by several LTs during the focus group interviews, was related to instructional practice—where teachers led by example, or co-taught in team member classrooms. The following focus group dialogue illustrates how one Lead Teacher, who was co-teaching with a team member took instructional risks and modeled how, even a well-planned lesson can change when we listen carefully to student thinking in the classroom.
Melissa: You do go in with a plan . . . and so we were doing this lesson and . . . we’re reading this [math] book, and all of a sudden, the kids look at it a totally different way than what the plan was. And so, I kind of looked at the teacher and said, “We can go two ways here—we can either go on with our plan that we had”, which would have been simple and straightforward, “or we can try this and see what happens” . . . and there was tonnes of good thinking, and all of that, I was just mad at myself. I thought, I should have anticipated that more . . . all these different things. And then it was Tara [researcher] that said, “No, you know what? You went the way the kids wanted to go.” And I thought, It’s true. I wouldn’t change that. That was the right thing to do.

Deni: It just blew your plan.

Melissa: Yeah, and that’s not as comfortable, right? . . . That’s the problem solving for the teachers. Thinking—really analyzing what happened here and what we could do differently next time.

Another form of instructional leadership, or modeling, occurred during team meetings and discussions about classroom situations. In other words, teachers were drawing upon the LT’s experiences and expertise as they discussed and sought feedback on their own teaching activities and the team’s chosen research methods.

Britney: I think most of our discussions in terms of that area, and the content area, are more on the situational—“This has happened, what do you think I should do here? I’ve got this particular child and this is happening, and this is happening, but this is not happening—any suggestion on how to support that student? . . . So, I think that most of the time, what I’m trying to do is to get the team to bring the information that they’ve gathered to the table, and look at it from the data perspective.

Faye explained that her mathematics expertise was something that her group looked for when making instructional decisions, but that, as the Lead Teacher, she tried to let others talk through their thinking before offering her own ideas:

Faye: I think they do tend to look to me for the math side of things as well, because they know I have that math background, so sometimes that is a little extra, a little difference. Because they seem to think that I would have an opinion about something. And I’m very opinionated, so they’re right about that. But yet, I’ve never wanted that to be me being boisterous all the time, and saying this is how it should be. I’m really trying to step back and just let them talk about it and then I’ll say, I think this, or I read a book on this, and just try to bring in... without being bossy. Because teachers are bossy, right? We’re used to that!
Lead Teachers often modeled research efficiencies and instructional strategies/knowledge that both provided support to their respective team members.

[IV] Lead Teacher as Mediator
A fourth area of LT role and responsibility that became evident in the data was that of mediator. At times, Lead Teachers were required to mediate, or intervene between two parties—often between teacher colleagues—to bring about a resolution to some form of dispute or difference of opinion. There were a few instances where LTs also needed to help negotiate between their teacher team and an external group (e.g., Board, university).

(i) Mediating between the Teacher Team and External Individuals/Groups
Occasionally, a Lead Teacher would need to broker some form of deal regarding release days, or how the ETFO initiative related to other parallel projects with additional paid release time and involving the school Principal or with a mathematics coordinator at the Board office.

Britney: [I]nitially discussing the project with the principal of curriculum who wasn’t really supportive and didn’t really understand what the goal was—she felt it would be . . . taking people’s attention away from the literacy focus. We had a long discussion about it, and I think I helped her to see how it would support the students in our district. Then again, just this research project I sort of had to advocate for the needs of my colleagues who were directly in the classrooms.

School administrators were almost always presented as being supportive of the ETFO initiative. As one LT explained, “It’s nice to be in the same school and we have a really supportive principal. I don’t know what it would be like if we didn’t.” However, there was one instance in which a LT described having to deal with a Principal who wanted to ‘overtake’ a lesson intervention strategy by enforcing a form of pedagogy that was not in keeping with the team’s reform-based, mathematics vision: “It was at our last one when we had our co-teaching session when you saw those really obvious moments when they recognized that the principal was trying to direct and teach, and how they all said, ‘Wow, this is not right.’” In this instance, the LR reported taking an active role during the session to redirect and regain focus.

(ii) Mediating between Team Participants
Lead Teachers indicated that almost all of their dealings with fellow team colleagues was positive in nature. However, there were a number of instances in which LTs described having to mediate between teacher team members in situations ranging from respectful, professional disagreement to much more heated confrontation. Most Lead Teachers indicated that one of their high priority functions was to facilitate positive and open communication between members of the teacher team, especially as the CAR work progressed.

Amber: Everyone seems to have resources and knowledge to share. We listen to each other, we support each other, and we are respectful of each other’s
differences. I think I have an easy job as Lead, working with this team. We share a commitment to doing a good job, and I think we all recognize that we are growing together. . . . I monitor our group conversations to ensure that we all have a chance to talk (to be honest, this requires little monitoring—it just happens!).

In this example, Amber was acting as the mediator to ensure relatively equal air-time amongst team members so that one or two participants did not dominate the discussions or the decision-making. Erica, on the other hand, mediated discussions to ensure professionalism that was built through the collaboration of team members.

**Erica:** There have been times where we challenged each other’s ideas, but we are able to discuss our ideas in a professional manner. The personal and professional relationships that were developed amongst members of the team exceeded my expectations as we are all considering working together on another action research project. . . . In discussions, we were able to agree and disagree about issues or ideas that all members put forward. I hope that I speak for all team members when I say how much we learned from each other and realized that we all had mathematical teaching strengths that we did not realize we had.

Erica’s recognition of the importance of healthy debate as a method of achieving common and/or deeper understandings was echoed by other Lead Teachers, such as Treeni.

**Treeni:** Decisions were made by intense discussion of differing views and perspectives. We often would throw ideas out and reach a consensus by debating theories and ways of thinking. Sometimes this meant ‘convincing’ or educating team members to ensure we were all on the same page.

There were moments when discussions were more intense, and where the LT attempted to guide the discussion to maintain an appropriate level of respect and professionalism.

**Halle:** At times, I have had to do a little work to maintain positive relations between team members, but absolutely nothing major or significant. . . . I did end up having to deal with something [more serious]. . . . We were talking about our doors being open and people being willing to let people in, or people not being so defensive, or in denial. That one little piece [became] a big, hairy deal and the person had said, “I know they’re in our group, and I don’t know if I can stand it anymore.” We went through the, “Let it go—I’m hearing you.” Through that process . . . I see it very much was connected to the fact that people really trust and respect each other within the group.

In this situation, Halle led the teacher team through a tense discussion relying on trust and respect within the team to work through and talk through the problem. Individual personalities were sometimes at odds as teams attempted to make decisions collectively, such as with Chelsea’s team.
Chelsea: There have been no surprises in our team dynamics. One member has been rather difficult to work with in most regards, and the rest have been extremely supportive, helpful and energizing. This member has some difficulty as a team player, and does not accept most suggestions or constructive criticism very well. Otherwise, we have all worked together cohesively, without any one member taking on an authoritarian role... [M]ost of us have tried to help each other by making suggestions, hearing ideas/problems and working together. When this member, for example, wanted certain things done his/her way, alternatives were patiently explained to him/her and the situation was diffused.

Mediation formed the fourth significant role of the Lead Teacher, as evidenced in the group interviews and through the eJournal responses. For some LTs this was managed comfortably; for others it was more challenging.

DISCUSSION

Lead Teachers engaged in a complex range of roles and responsibilities to manage and organize communications, meetings, research data, and report writing; they also took on the role of motivating individual teachers and the group as a whole throughout the CAR process. Their role also involved encouraging risk-taking and innovative practices. Lead Teachers also served as models of effective pedagogical practices, and functioned as mediators between external stakeholders and the team, and sometimes between team members themselves. Clearly, the LT role was multi-faceted and instrumental in supporting positive learning outcomes for the CAR teams.

One area of intrigue in the findings was the perceptions of teachers related to their designation as “Lead Teachers”. Most of the 14 Lead Teachers interviewed indicated that they, to at least some extent, were dissatisfied with the actual title “Lead Teacher.” According to some, they thought that this title might cause the LT to be considered “different,” or “highly qualified,” or as an authoritarian type figure, when in practice, decision-making was shared squarely amongst team members.

Kristen: Every one of us has our strengths to contribute to the team, and that happened fairly naturally. Often, we would have a huge to-do list, and by the end of our planning time, the list would be for the most part done. So, in our case, a team lead acted as a coordinator with ETFO and [university], but was not a “lead,” per se, in the functioning of the team. Since all of us are in the same school, and had done lesson study before, the need for a more traditional “leader” was definitely minimized.

Treeni: I think that the whole term of lead teacher is almost, for us, misleading because there wasn’t a leader. I didn’t see myself as a leader, and anything that had to be done, I went and asked my team. I didn’t make any unilateral decisions.
It appears that this conception of the team using a distributed leadership approach was clearly the lens that most Lead Teachers, and teacher team members used. Lead teachers frequently described all team members as instructional leaders: “I think we were all leaders because as teachers, we were all doing something that we think is necessary . . . so we’re all leaders because not everyone [teachers] is doing this.”

Simultaneously, Lead Teachers did acknowledge that their organizational responsibilities were distinct from other team members, and they were by and large content to manage the various elements of the project such as meetings, release funds, collation of research data, and to act as liaison between the team and other parties (ETFO, board, university, administration).

**Erica:** As the Lead Teacher, my role mainly was organization—I organized the agenda for each of our meetings, sent in all the paper work, and collected data from team members. To say that one person was the leader is not really appropriate, as I feel that we are all leaders because we took the time to develop an area of our programming within our classrooms that we all believed was necessary.

However, this organization role was met with some tension: by being named the Lead Teacher, some Leads felt that this title absolved other team members from responsibilities for reports, data collection, and ownership of the project:

**Halle:** I think that that’s the biggest issue for me. . . . The second that you see somebody as being “in charge,” other people lose ownership. If it’s not a shared ownership, this doesn’t, to me, move anywhere. So, if I was to take on responsibility—people will give it if you take it. So, really ensuring that that isn’t the way it is. That it’s very much an equitable platform and that everybody takes turns. Even sharing facilitation. It might start out with me but I hope it doesn’t stay like that. That’s really something I want to focus on.

One LT felt that the title actually encouraged team members to boycott their responsibilities in the sense that the LT was given more benefits (two additional release days/prestige) and should, therefore, carry a greater load when it came to data collection and finalized report writing.

**Daphne:** As the year progressed, I found I needed to remind people more frequently about meetings and tasks. I also felt that at the end, the majority of the report finessing fell to me as once the year ended, everyone went their own ways. I think the nature of the title and role gave everyone leave of responsibility and left me picking up the pieces.

Interestingly, some Lead Teachers actively pushed back on their role as leaders because they did not see themselves as “traditional leaders”.
Treeni: Whenever I responded to a question it was always, I don't feel like the leader... I put things out there for the agenda, but I was an organizer, I was not the leader in the traditional sense of the role.

Melissa: It's not a real leader person; it's an organizing person, and those sorts of things. There isn't telling people what to do as the leader, or running a school like a principal is supposed to be a leader. It's nothing like that. It's very different. It's about equality and it's about relationships with your colleagues.

Lead teachers clearly distinguished between their administrative organizational role and their role as an equal decision-making member of the CAR team:

Amber: I confirm each meeting date/time/place as it approaches, and discuss with the other group members what we will be doing at that meeting. However, our group functions with minimal leadership... we discuss, share, disagree, etc. as a group of individuals with a common purpose. I am simply one of five strong members of our team. When we meet, we all have something to contribute. Everyone seems to have resources and knowledge to share.

Gloria: Recognizing and acknowledging individual strengths. I think because of this, our group has never seen anyone as the “leader” but instead we view ourselves as a group of teachers that work together to learn about teaching students—no-one is really in control. This has allowed for a very strong group dynamic to occur because everyone is seen as valued and as an equal. Organization—since my group has so many strengths, and they are very busy, this is one area I think I can contribute to the group without it becoming a burden on the rest of the group members. Organizing the paperwork, dates, dinners etc.—basically staying on top of things.

It is interesting to note that some statements about leadership might appear to be contradictory on first analysis. For example, one Lead Teacher indicated that there “really isn’t a need” for a leader, but that it would “really be crazy without one”. Similarly Gloria, in the above quote suggested that “no one is really in control” but then described how she took care of paperwork, dates, dinner meetings, and “staying on top of things” as ways for her to take the “burden” off her colleagues. Further, Lead Teachers offered suggestions for different titles such as Coordinator, Administrator, Contact Person, Liaison, Facilitator, or Organizer to place the emphasis on the management aspects of the role.

We conjecture that one possible reason for these apparent contradictory statements lies within the perceived definition of what “leadership” involves. Whereas traits-based leadership theory has typically emphasized the charismatic, authoritative (not necessarily authoritarian) leader image, more recent leadership models such as “distributed,” (Spillane, 2005) allow for a more shared leadership style wherein truly capable leaders are those seen as possessing the ability to acknowledge and to emphasize the best and most creative contributions of those around them, rather than commanding obedience or even leading by example. When LTs indicated that there is really no need for a team leader, or
that no/little team leadership was actually evident in their group experience, they may have in fact only been indicating that they were focusing on traditional meanings of leadership rather than considering the legitimacy of distributed leadership, or a “first among equals” approach to shared leadership within a group dynamic.

In summary, Lead Teacher roles and responsibilities in Collaborative Action Research were shown to be complex, involving elements of management, motivation, modeling, and mediation. It seems that greater attention to defining the role of Lead Teacher, and legitimizing distributed leadership constructs may benefit both Lead Teachers and team members in negotiating roles and responsibilities during the collaborative action research process.

REFERENCES
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