

## **Merits and Limitations of Distributed Leadership: Experiences and Understandings of School Principals**

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### **Abstract**

Although claiming leadership to be critical to school improvement, few studies seek the informative voice of principals regarding their understandings of roles and sources of leadership. Using a distributed perspective as a theoretical lens to reconceptualize leadership, this article explores principals' perspectives of leadership in relation to their roles as defined by legislation and policy. By examining the primary merits and limitations of Spillane's (2006) distributed framework, consideration is given to persistent issues yielding implications for the practice and study of educational leadership. Lastly, I urge further investigation into the extent to which distributed forms of leadership may contribute to school improvement.

## Introduction

Distributed leadership is receiving great attention and increased support in recent educational discourse (Gronn, 2000; Harris, 2004; Spillane, 2006). Although distributed leadership provides a theoretically-grounded framework to examine leadership practice, the concept is relatively new, lacks a widely-accepted definition, and has a limited empirical research base (Bennett, Harvey, Wise & Woods, 2003; Harris, 2004; Spillane, 2006; Timperley, 2005).

Within Alberta, the work of school principals continues to intensify and become more complex as ideologically-driven reforms and external interventions by government increase. Although claims in current educational journals underscore the importance of the principal's leadership in school improvement (Hallinger & Heck, 1998; Leithwood & Jantzi, 2000), it is not surprising that scholars and practitioners are looking beyond the principalship to identify and examine different leadership perspectives that emphasize school leadership as a "social influence process" (Yukl, 2002, p. 14).

While there are extensive studies within educational research about *what* structures and processes impact school improvement, relatively few studies seek the informative voice of school principals regarding their experiences and understandings of *how* and *why* leadership is undertaken in diverse contexts (Elmore, 2000). Heck and Hallinger (1999) substantiated this claim through a review of the educational literature – citing many "blank spots" (i.e., shortcomings such as "in-depth description of how principals and other school leaders create and sustain the in-school factors that foster successful schooling") (p. 141) and "blind spots" (i.e., epistemological and theoretical biases that limit understanding, such as scholarly preoccupation with principals' leadership that "ignored other sources of leadership within the school") (p. 141).

Although the current evidential base is relatively limited, Spillane (2006) has contributed the most recent and illustrative empirical data about distributed leadership to the educational literature. Spillane (2006) adopted a cognitive perspective when offering the distributed leadership framework as a diagnostic and design tool to help practitioners explore *how* the practice of leadership is "stretched over" (p. 23) multiple leaders, followers, and the situation – either by design, default, or necessity. The

*situation*, Spillane argued, is an integral and constituting component of leadership practice. Using illustrative case studies, Spillane argued:

A distributed perspective offers an alternative way of thinking about leadership in schools by foregrounding leadership practice and by suggesting that leadership practice is constructed in the interactions between leaders, followers, and their situations...distributed leadership offers a framework for thinking about leadership differently. As such, it enables us to think about a familiar phenomenon in new ways that come closer to approximating leadership on the ground than many of the conventional popular recipes for school leadership. (p. 26)

Drawing upon Spillane's (2006) definition, this investigation aims to examine principals' constructions of distributed forms of leadership. Heck and Hallinger (1999) contend that the adoption of a constructivist research orientation is most appropriate to "examine how leaders and others in the organization create shared understandings about their role and participation in school" (p. 146). The study was designed and conceived to illuminate "that which is little known or hidden from view" (Heck & Hallinger, 1999, p. 147) and to address the need for more evidence and in-depth examination of principals' understandings of leadership as they work in the current era of accountability. In this paper, I first describe the context and method of this study. After I critically discuss the primary merits and limitations of the distributed framework offered by Spillane (2006), I will explore key themes emerging from principals' experiences and understandings of leadership based on my analysis of the data. Next, I give consideration to persistent issues or controversies in the education field that yield implications for the practice and study of educational leadership. Arguing that Spillane's distributed perspective offers an important theoretical lens to reconceptualize school leadership practice, I conclude by urging further investigation into the extent to which distributed forms of leadership contribute to school improvement and enhanced student learning.

### **Context**

Education reform has been a dominant topic of debate in policy arenas over the past decade. Trans-national studies identify similarities in reform, including "the devolution of financial and managerial control to more local levels, promotion of parental choice, increasing diversity of provision, and a change in the role of governments"

(Taylor, 2001, p. 8). Specifically, the province of Alberta has embraced school-based decision making (Alberta Education, 2007) to involve:

the whole school community [a school's students, their parents and other community-based support elements] in teaching and learning in order to ensure high levels of student achievement. School-based decision making is a process through which major decisions are made at the school level about policies, instructional programs and services, and how funds are allocated to support them. (Policy 1.8.2)

Having to respond to such ideologically-driven reforms, the work of school principals continues to intensify and become more complex. At a time when the province of Alberta is facing an impending principal leadership shortage, many principals report diminishing levels of quality and satisfaction with their professional lives derived from navigating conflicting demands and struggling to meet the needs of a diverse student population (Wallace, Foster & da Costa, 2007).

The critical role of school principals as instructional leaders is often highlighted in research and policy. Leithwood and Duke (1999) described instructional leadership as attending to school culture and other organizational variables believed to influence “the behaviours of teachers as they engage in activities directly affecting the growth of students” (p. 47). The principal’s instructional leadership role has also been described by scholars as a critical element in determining the overall effectiveness of a school (Blasé & Blasé, 1999; Hallinger, 2003).

Within Alberta, the instructional leadership role of school principals is emphasized in educational policy. The School Act (Province of Alberta, 2002, Part 2, Section 20) states that the principal of a school must (a) provide instructional leadership; (a) ensure that the instruction is consistent with provincial courses of study; (c) evaluate or provide evaluation of programs; (d) ensure that students have the opportunity to meet educational standards in the province; (e) maintain order and discipline; (f) promote school-community cooperation; (g) supervise evaluation and advancement of students; and (h) take responsibility for the evaluation of teachers. Other provincial (Alberta’s Commission on Learning, 2003) and local jurisdictional policies (Edmonton Public Schools, 2007) also describe the principal as an instructional leader who, directly and indirectly, influences teaching and learning. As Alberta actively

works towards principal certification, the associated rhetoric in the *Principal Quality Practice Standard* (PQPS) provides yet another description of the principal as an instructional leader who requires “in-depth knowledge of curriculum and pedagogy” to ensure that “all students have access to quality teaching and have the opportunity to meet the provincial goals of education” (Alberta Education, 2006, p. 5). Should Alberta’s Ministry of Education adopt the PQPS as official policy, Alberta principals will be expected to meet this standard, in addition to other legislated requirements and policies, through the duration of their careers.

During the 2006-2007 school year, as a strategy to enhance instructional leadership, the Alberta Teachers’ Association in collaboration with the University of Alberta and one school jurisdiction piloted a new professional development program for school principals. The *Reflections on Practice - An Institute for School Leaders (ROP Institute)* was comprised of a cohort of school leaders and central office personnel who engaged in face-to-face workshops, online discussions, and action research throughout the school year. This intensive learning experience focused on principals’ growth as instructional leaders in relation to Alberta’s PQPS by incorporating reflective practice, collective inquiry and action research (Wright, da Costa, & Peters, in press). Participants were challenged to reflect on their professional practice as school principals, question their assumptions and practices, and engage in collaborative learning with other school leaders.

### **Method**

This study began September 2006; data collection was completed by early June 2007. To carry out my research, a collective case study approach (Merriam, 2001) and comparative thematic analysis (Stake, 2000) were used.

The Hillview Public School District (pseudo name) was selected because of the jurisdictions’ desire to be involved in the *ROP Institute*. This small, urban jurisdiction within Alberta has fewer than 20 schools in total and is comprised of secondary (grades 7-12) and elementary (kindergarten - grade 6) schools. During the 2006-2007 school year, fewer than 10,000 students were enrolled in this jurisdiction from Kindergarten to Grade 12.

The participants in the study consisted of thirteen practicing principals, two assistant principals and two central office personnel in this jurisdiction, as well as two facilitators from the ATA and one active principal (external to Hillview) who served as a “critical friend” and online facilitator. School principals were the key informants. Each of the central administrators and facilitators had recently worked, or was still working within the principalship, during the time of the interviews.

To address what Heck and Hallinger (1999) have described as “blank spots” and “blind spots” (p.141), deeper understanding of school leadership was garnered primarily through individual, semi-structured interviews as described by Stake (2000) and semi-structured focus group interviews as outlined by Mertens (2005). Other sources included field observations (onsite and online workshops) and a researcher’s journal.

Convenience sampling was used within this study. Participants were invited to participate in a focus group, individual interview, or both. Participants represented a wide range of cases (based on varying ages, experiences, background, and qualifications). Although convenience sampling may not always be the most desirable sampling strategy, non-probability-based sampling strategies reduced the more subjective nature of some selection processes (Mertens, 2005). Three focus groups were held with principals prior to the individual interviews – each lasting approximately 60 minutes. Focus groups were viewed as a pertinent data collection method as the interactions between participants “allows the exhibition of a struggle for understanding how others interpret key terms and their agreements or disagreements with the issues raised” (Merten, 2005, p. 245). Ten individual interviews (four principals, one assistant principal, two central office personnel, and three workshop/online facilitators) were held. Individual interviews, lasting approximately 60 minutes, were semi-structured to allow for the inclusion of individual differences and were based on information or questions that developed from the focus groups. Semi-structured interviews were used because of the degree of flexibility for the interviewer and participant to clarify and elaborate beyond the scope of the predetermined questions and to probe unexpected responses. Focus groups and individual interviews were audio-recorded and transcribed. Member checks were used to corroborate interpretations with focus group and interview participants

(Bogdan & Biklen, 2007). Participants were invited to verify, correct, and elaborate on emerging themes and supporting quotations.

The first stage of data analysis occurred while data were collected, and the second stage occurred when data collection was complete (Bogdan & Biklen, 2007). Initial analysis of data was done with a co-researcher<sup>1</sup>. This process allowed me to consider insights afforded by the “reading” of the same data through different lenses (Morgan, 1998). Data were examined for symbolic language, interactions, and objects that elucidated principals’ understandings of leadership (Hatch, 2002). Through thematic analysis (Stake, 2000), during and immediately after the focus groups and interviews, data were coded and categorized according to patterns and emergent themes related to the purpose of the study (Berg, 2004). Consideration was also given to disconfirming evidence, counter-interpretations, and patterns emerging from an absence of data or lack of patterns (Berg, 2004). The examination of the data also resulted in interpretations that I examined “in light of a formalized body of knowledge in the form of constructs or theories” (Mertens, 2005, p. 423), particularly Spillane’s (2006) distributed leadership framework.

Methodological triangulation was used to enhance trustworthiness. In addition to member checks, prolonged engagement at workshops and on the website provided opportunities to capture salient issues and note divergent information and themes (Guba, 1981). Regular peer debriefings, in addition to sharing emerging insights and seeking external critique at conferences, allowed for consideration of new perspectives and presented opportunities to challenge biases when engaging in data analysis. Continued use of a researcher’s journal also supported practices of reflection and reflexivity (Guba, 1981). The data presented here represents the experiences of specific respondents. Rich illustrative examples are used to allow readers to assess transferability of the findings (Merten, 2005).

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<sup>1</sup> I am grateful to my co-researchers, Drs. José da Costa and Frank Peters, for allowing me to refer to our work in this article.

## Merits of Distributed Leadership

Recognizing certain “blank spots” and “blind spots”, Spillane (2006) provides insight into the *practice* of school leadership. Here, I argue the merits of Spillane's distributed theory.

With increasing demand and importance placed on school improvement and implementation of a notable proliferation of innovative reforms (Levin, 2000; McInerney, 2003; Taylor, 2001), Lambert (2002) contends that “the days of the lonely instructional leader are over” and that “substantial participation of other educators” (p. 37) is required. Promoting multiple and distributed sources of leadership that stretch over complex social and situational contexts, Spillane (2006) disputes positivistic and bureaucratic leadership theories emphasizing specialized roles, behavioral traits, and unilateral functions (Burns, 1978; Immegart, 1988). Instead, he presents a compelling view of leadership as a shared, social influence process whereby intentional influence is exerted by leaders and followers over other people “to structure activities and relationships in a group or organization” (Yukl, 2002, p. 3).

Considering recent dissatisfaction with models of instructional leadership that focus on the principal as the center of knowledge, expertise, power and authority (Hallinger, 2003), Spillane (2006) promotes leadership “as a product of the interactions of school leaders, followers, and their situation” rather than “as a product of a leader’s knowledge and skill” (p. 144). Considering schools operate within complex open systems (Owens, 2004), it is unrealistic for principals to be “experts” in all matters. Supporting Elmore’s (2002) *principle of comparative advantage*, distributed leadership is premised on people leading when and where they have expertise. Spillane makes a strong case for more manageable and effective practice “stretched over” multiple appointed and de facto leaders. Moreover, leaders are dependent on followers (Smylie & Hart, 1999) and followers are equally crucial in creating practice and understanding leadership dynamics (Burns, 1978).

Spillane's (2006) *leader-plus aspect* reveals that it is the *interactions* of people or the “reciprocal interdependency between their actions” (p. 146), not solely the actions and expertise of heroic principals, that construct leadership practice. Building on organizational theory, Spillane identifies collaborated, collective, and coordinated forms



of distribution. In each case, Spillane presses us to look beyond who takes responsibility for particular functions and routines and points out how leadership practice exists in the *intersection* of leaders, followers and their situations. Similarly, Smylie and Hart (1999) emphasized how “attention shifts from people’s actions to their social interactions” (p. 435). Different school members emerge and take on leadership functions as dictated by the situation and their own interests and expertise. Leadership becomes “socially critical” when it “does not reside *in* an individual but in the relationship between individuals, and it is oriented toward social vision and change” (Foster, 1989, p. 46).

Human and social capital theory suggests that social relations enable or restrain productivity, thinking, and learning (Smylie & Hart, 1999). Spillane recognizes communal and relational aspects of leadership. Dialogue, as described by Spillane, multiplies the original, individual act of leadership by bringing people, materials, and organizational structures together in a common cause. Through dialectic engagement, conflict is validated as means to developing a more nuanced understanding – norms, artifacts, and tools are open to restructuring and “truth” is no longer static and absolute. Collective inquiry potentially creates shared vision and accountability (Copland, 2003) and reflects the dynamic interdependence and influence that occurs between individuals and groups as they engage in a continuous pattern of co-construction (Greenfield, 1993). Analyzing how tasks are “stretched over” the practice of multiple players, Spillane highlights *who* takes responsibility for a task (who leads is dictated by the task – not hierarchical position) and *how* the task is accomplished through interactions of multiple leaders and followers. Meaning is elucidated through the juxtaposition of multiple and separate realities (Greenfield, 1993).

Another strength of Spillane’s theory is his analysis of the socio-cultural context of leadership (*situation*) that constitutes and defines leadership practice and influences interactions between leaders and followers. Situation includes designed routines, tools, artifacts, and structures through which people act – the *how* of leadership practice is fundamentally enabled or constrained by situation. For example, Spillane describes how achievement data may focus the principal’s attention on different aspects of teaching and leadership (i.e., achievement data may be analyzed for curricular coverage or test

preparation, or on the other hand, data may frame discussions about future learning priorities). Although the principal negotiates the situation (i.e., the achievement data), situation is still a defining element of practice. The extent to which and how a given tool transforms practice varies considerably. Although the importance of situation is documented in contingency theories, Spillane asserts that situation is not an independent, external variable, but rather it must be “identified as a constitutive and influential component of leadership activity” (Timperley, 2005, p. 417).

Distributed leadership is a non-hierarchical and inclusive leadership approach that fosters collaborative and ethical practice (Hodgkinson, 1991; Ryan, 2003; Starratt, 2004). Because performance is negatively impacted when people feel alienated and powerless, the “ability to empower others” leverages “the commitments and capacities of organizational members” (Leithwood & Duke, 1999, p. 48) through bottom-up participation of others towards the attainment of organizational goals. When the beliefs and contributions of teachers are considered important – teachers are also more likely to support school goals (Sheppard, 1996). Distributed and transformational leadership emphasize the critical relationship between motives, resources, leaders, and followers (Burns, 1978). Both conceptualize leadership “as an organizational entity rather than the property of a single individual” (Hallinger, 2003, p. 338).

Spillane acknowledges the managerial imperative dominating principals’ work and argues that transactional routines (macro and micro) also constitute practice – even if technical tasks protect and legitimize institutionalized structures (Greenfield, 1993; Hodgkinson, 1991). Therefore, leadership is inevitably distributed in schools; however, the distribution may or may not be transformational in nature. Hence, Spillane examines both social interaction and situation simultaneously – considering espoused theories and theories-in-use (Argyris & Schön, 1974). Emphasis is placed on “*how* the leadership activities are distributed and the ways in which this distribution is differentially *effective*” (Timperley, 2005, p. 397). Spillane depicts distributed leadership as collective, educative, dissensual, causative, and ethical.

Lastly, Spillane provides a useful lens to reflect on practice, rather than prescribing a blueprint that defines and limits practice (Schön, 1987). Acknowledging benefits derived from a multiplicity of leadership approaches, Spillane's theory is

inclusive of other leadership approaches (Heck & Hallinger, 1999). He considers schools as *designed* (formal structure represented in designated positions and organizational routines) and *lived* (what happens in daily practice) organizations that frame and shape leadership practice. Denouncing structural-functionalist perspectives, Spillane's model potentially allows for constructivist conversations, reflective thinking, collaborative planning and problem solving to address the perennial problems of education (McInerney, 2003; Sergiovanni, 1991; Timperley, 2005).

### **Limitations of Distributed Leadership**

Despite a plethora of research, educators must assume a critical attitude to consider how new theories play out in problematic and contradictory ways. Without intending to diminish the strengths of the distributed framework, the following discussion about the potential limitations of Spillane's (2006) theory of distributed leadership is offered.

At the onset, discussions of distributed leadership may end prematurely with acknowledgment that multiple individuals take responsibility for leadership within a school (Spillane, 2006). It may be challenging for practitioners to understand the extent that *situation* actually constitutes and defines leadership practice through interactions between leaders and followers. Moreover, it appears that distributed leadership, when not executed properly or when exclusively implemented in a "top-down" approach, can be interpreted as misguided delegation or even coercion (Hatcher, 2005).

Spillane's assumption that principals understand how position and relationships may be used positively or negatively is problematic (Burns, 1978; Hatcher, 2005). Principals, by virtue of authority and position, are "managers of organizational meaning" (Anderson, 1990, p. 43). Ignoring how principals participate "as *unequal* subjects" fails to make "explicit the political nature of education and how power operates to privilege, silence, and marginalize individuals" (Anderson, 1990; McIntosh, 1988; Ng, 2003, p. 214). Although alluding to the "myth of individualism", the distributed framework only begins to acknowledge the need "to examine our educational values, beliefs and practices by examining our own role in each of the acts of power/knowledge" (Jardine, 2005, p. 55) that may pervasively and silently operate to monitor, classify, and control. Limited consideration is given to analyzing ethical issues and micro-politics inherent in

change or “social engineering” processes (Anderson, 1990; Bourdieu & Wacquant, 1991). Subsequently, principals can be barriers to distributing leadership (Barth, 2001; Hatcher, 2005) by: (a) holding tightly to power and control, (b) refraining from nurturing alternate leaders, and (c) choosing to involve only those who support their agenda. When leadership is intentionally distributed and limited, principals create conditions for “unchosen” teachers to surreptitiously lead, or for followers to influence leadership through subtle insubordination (Burns, 1978; Hatcher, 2005). Moreover, Hatcher (2005) raised ethical considerations around use of distributed leadership to inadvertently or explicitly secure and coerce commitment of teachers to improvement interventions and government reforms.

Arguably, Spillane’s (2006) distributed framework gives minimal attention to the roles, responsibilities or circumstances under which the formal leader (i.e., the principal) *must* exercise leadership. To simply ignore the legislation and policies that define the role of the principal, and hold principals accountable for their actions and school-based results, would pose significant ethical, professional and organizational concerns.

Spillane presents an alternative to hegemonic management models that limit widespread participation. However, the distributed leadership framework is predicated on a ready and willing cadre of followers waiting to assume leadership responsibilities. Moreover, insufficient attention is paid to redistribution of power beyond teaching staff to include students and parents (Foster, 2004). The assumption that closed social structures (e.g., internal professional learning communities) enhance leadership practice is also questionable. Smylie and Hart (1999) explained the importance of balance between openness and closure of social structures and internal and external ties. Closed structures “limit access or receptiveness to new and potentially challenging information” and reinforce “problematic knowledge and assumptions and lead to inferential errors, poor decisions, and unproductive behaviors” (Smylie & Hart, 1999, p. 425). Social relations may exemplify “collaborative, but exclusionary professionalism” (Hatcher, 2005, p. 263). This may “spawn and sustain parochial beliefs and unproductive practices” if an “open exchange and critique of ideas and assumptions, multiple referents and sources of information, and equitable distribution of authority” (Smylie & Hart, 1999, p. 437) is lacking in interactions of leaders, followers and their

situation. Closed forms of distributed leadership limit collective and democratic management of schools through exclusion of certain individuals or groups from full participation (Hatcher, 2005).

Spillane's emphasis on interactions or interplay between leaders and followers is well-developed, yet direct relationships with student learning are vague. Spillane (2006) concludes that "leadership practice connects with instructional practice" and that "teaching and learning should be a central concern" (p. 90-91). Whereas Heck and Hallinger (1999) argue that "student achievement ought to be the dominant criterion for assessing leader[ship] effectiveness" (p.158), Spillane (2006) purports that "figuring out the nature of the beast is imperative before making any attempts to measure its effectiveness on teaching and student learning" (p. 102). Spillane's emphasis on multiple people and situations tends to blur and reduce student learning to oversimplified representations – at times, student learning is not visible through an opaque film of lofty rhetoric and theory. Timperley (2005) surmises that "increasing the distribution of leadership is only desirable if the quality of the leadership activities contributes to assisting teachers to provide more effective instruction to their students" (p. 147).

Arguably, the assessment of leadership effectiveness remains a highly contested space. Contradictions inherent in the tendencies of scholars, practitioners and policy makers to measure leadership effectiveness through student achievement outputs may inadvertently exclude other criterion or possibilities for determining leadership effectiveness. Clearly, when assessing the effectiveness of distributed forms of leadership, a range of qualitative measures should be considered. Besides student achievement, might other measures of leadership effectiveness include the sense of community instilled? Creating engaged citizenry of the student body and staff? Developing compassion and understanding within the school and across borders?

### **Discussion and Implications**

Tension around the issue of influence and inclusion emerged through cross-examination and analysis of the principals' understandings of leadership in relation to their mandated role as instructional leaders. In this section, I will reflect upon the

lessons learned from the participants in this study. The following discussion addresses: (i) the leader-plus aspect, (ii) the situation aspect, (iii) constructions of distributed leadership and the relationship to school improvement, and (iv) barriers to distributed leadership.

### ***The Leader-Plus Aspect***

When asked about their reasons for pursuing an appointment to the principalship, most participants expressed altruistic motivations for entering administration (e.g., "making a difference"). They often emphasized the importance of the principal's leadership in school improvement and saw the principalship as an opportunity to provide "broader support and influence." One participant shared, "The principal sets the tone for the whole building. Whether you like it or not, they are looking at you, right?" Another principal stated, "We don't want the captain spending all the time in the mechanical room. Every now and then, the captain needs to get out and move to the front of the ship and steer the vision." Although the principal was often deemed to be the "catalyst" for school improvement, most participants readily highlighted the contributions of informal leaders such as teachers and counselors.

Many principals told me that increasing workloads, expectations for accountability, and implementation of school improvement reforms demand a reconceptualization of traditional school leadership roles. The *ROP Institute* principals reported that structural changes previously brought about by reforms such as school-based decision-making have resulted in shared decision-making, distributed forms of leadership, and more inclusionary processes.

Expressing dissatisfaction with approaches of instructional leadership that focus on the principal as the center of knowledge, power and authority, one principal stated, "I don't set myself up as the big guru...Why would I set myself up as knowing any more or any less than they [teachers] do?" This was echoed by a newly-appointed principal who revealed, "For some reason, I don't know [that] I like being in charge." One of the impediments to instructional leadership, as described by principals during the interviews, was the principal's burden of independently assuming leadership responsibilities. Participants felt it was unrealistic for the principal to be viewed as an "expert" in all matters. Several principals admitted to having less expertise than the

secondary teachers they supervised. Principals preferred leadership approaches premised on people leading when and where they have expertise and espoused the benefits of teachers serving as instructional leaders. “Maybe that’s what the instructional leader means – it’s not doing it all yourself,” reflected one principal who challenged traditional conceptualizations of instructional leadership. Although there was definitional diversity among Hillview principals’ constructions of leadership, there was a high degree of consensus that instructional leadership models (emphasizing the principal’s role in directly supporting teaching and learning, defining mission, and managing curriculum and instruction) are problematic. This principal stated, “It puts me in a position where I’m supervising teachers. I’m not comfortable doing that because I’m a classroom teacher, as well as an administrator, and I would never put myself above another teacher professionally.”

Principals welcomed multiple and distributed sources of leadership that naturally emanated out of complex social and situational contexts. Distributed leadership seemed to flourish when a principal supported “capacity building” (Lambert, 2002) and developing learning communities (Leonard & Leonard, 2001). When asked about their affinity for these non-hierarchical approaches, principals explained that social trust and collective agency was enhanced when principals relinquished control and shared authority with teachers. One principal explained how leadership is enhanced “with teams...Everyone is a teacher, everyone is a learner.” Cooperation, over competition, seemed to be valued as a means to improving schools and professional practice. Another principal described how she trusted the motives and valued the capacities of her colleagues to provide leadership. She stated, “We all have great gifts to contribute and my role as a principal is to help you with that.”

Principals described how they tried to strategically and authentically involve others in school leadership. One principal explained:

When [the assistant principal] and I are away from the office it is an opportunity for teachers to come in and take our place...We’ve intentionally tried to create different kinds of opportunities for leadership. A lot of times, we say, “Here’s an opportunity. If you want to avail yourself of it, you can.”

Leadership was a choice open to school members in a range of situations and at different times.

### ***The Situation Aspect***

Considering the socio-cultural context of leadership that constitutes and defines leadership practice and influences interactions between leaders and followers, one principal described how a summative teacher evaluation form focused his attention on different aspects of teaching (i.e., generic checklists to monitor components of lesson plans define practice differently than anecdotal observations of student learning used to engage teachers in ongoing reflective dialogue for professional growth):

I want you to learn some things and I'm going to help you learn some things, or ask questions. The teachers have the tendency to believe that the evaluation is being done to them and so my philosophy is we're doing it with you and for you. But this is really the teacher's evaluation.

In this case, I learned that the principal's hands-on negotiation of the situation (i.e., the use of the evaluation tool) also defined the interaction with the teacher, as well as the outcome of the evaluation process, rather than his own actions as an instructional leader.

Principal respondents believed that new and enhanced learning occurred as a result of the concerted action that emerged through the dynamic interactions between individuals or the group, as well as the given situation. This was further illustrated when a principal described how report cards could be used strategically to engage teachers in professional and collaborative dialogue about teaching, learning, and assessing student progress, rather than serving just as a summative achievement record. When asked about school improvement, the principal indicated that teacher practice and ultimately organizational change was enhanced through collaboration. He explained that "what we really want is to get the teachers, in a group, to start reading the report cards and talking about them. It's kind of a long, slow process though." At this point during the interviews, I observed that this principal, like many of the principals, often speculated about the distribution of leadership as "what might be" or what could "be ideal," rather than depicting "what is." Similarly, I observed this phenomenon during onsite reflection



periods when principals dialogued and appeared to struggle with the tension between their espoused theories and theories-in-use.

The notion of distributed leadership was used interchangeably by principals with shared, participatory, democratic and collaborative leadership approaches, as well as professional learning community, teamwork, collegiality, and mutual collaboration. Although these constructs were often used synonymously with distributed leadership, one participant emphasized that distributed leadership is the product of interactions between people and the situation (e.g., environment, artifacts and routines) and it should not become another “innovation” or “thing that is added to the principal’s plate.”

### ***Constructions of Distributed Leadership and the Relationship to School Improvement***

As principals engaged in school improvement initiatives, they placed great importance on relational aspects of leadership and the development of learning communities. For example, one principal suggested, “One of those great services that we give to children is to be supportive of teachers. All of it comes back to relationships.” Many participants described interdependencies existing within “healthy” relationships:

Everyone’s playing a role...everyone’s buying into it right now and we really love the culture. We’re hoping to sustain it. So hopefully it’s something that will continue to grow. You know on staff you’ll have a group of back benchers who are you know ... well some of those [backbenchers] have really come forward and are strong members of our community now... They’re not talking in the parking lot about what’s going on. They’re coming and talking to us and say, “There are some things we’d like to work on” and they feel like they’re a part of the picture.

Emphasizing relational aspects of leadership within organizations such as schools, this newly-appointed principal described the benefits of distributed leadership:

We have humour in the workplace. In four and a half hours, you know an outsider looking in [where the principal and assistant principals are collaboratively planning and reflecting] would think, “All they do is laugh in there. Don’t get any work done.” It’s amazing how much work gets done in that time. Monday use to be the worst day of the week for me and Monday is the one day I look forward to the most ‘cause I know we’re gonna have four hours of laughing and getting work done. We’re stupid busy – but it’s fun because we care about each other and we help each other out. If I need something I know I can just ask anybody.

Findings suggest that principals' perceived leadership as occurring within the context of the community and in between individuals, rather than as a mere function of one's position. Participants felt that distributed forms of leadership allowed themselves and school members the space, structures, and time needed to engage in reflection and to access differing viewpoints. For example, one principal shared how distributed leadership occurred spontaneously from the activities of educators working together to improve schooling:

We kind of get excited about it [use of distributed leadership]...because we're proud of it. I think it's expanding to our teachers...to other schools. With the other principals of Cranbrook Heights, McCoy and...now we meet monthly and more so at [one of the high schools]. The principal and I meet monthly or every second month...and we're just sharing ideas and we feel like we're a team. So now when there are things that come up and I need advice from somebody who has that kind of experience, and you know that none of us in our school have that kind of experience, I can go to them [other high school principals].

Distributed leadership was described by respondents as offering opportunities for principals and teachers to learn from each other by interrogating assumptions and sharing practices. Principals' understandings reflected a belief that leadership is enhanced when it occurs within and across schools and even other school jurisdictions. In these cases, collective agency naturally emerged in a "bottom-up" manner rather than being something "imposed" by the formal leader "on others." However, I observed that principals generally selected like-minded colleagues and mentors to discuss leadership challenges and unanticipated problems.

Social trust and cohesion was viewed as critical to building instructional leadership capacity. Although different school members assumed leadership roles as dictated by the situation and their own interests and expertise, principals readily admitted that some teachers held fast to personal assumptions about the role of positional leaders. Subsequently, teachers questioned the extent of their discretionary decision-making abilities. Explaining how school meetings and collaborative planning were strategically designed by the administration team to build internal leadership capacity, this principal described:

We grouped our teachers...Each of those groups has a teacher who does it by volunteering and informally. One person is the chair. One person is the secretary

to keep notes and some people are better at keeping notes than others. It's really hard because when you're on a committee, they always think because you're the administrator, your chairing...you make all the decisions. We like to be the ex-officio member of the committee but we like to be on...like part of me wants to be there to see what's going on.

Despite attempts to distribute leadership, the principal was still perceived, by teachers, as holding and seeking the "real power." Yet, with the exception of one principal who viewed his role as more of an "authoritarian figure," the other principals indicated a commitment to reciprocal learning and inclusive leadership. In fact, one participant stated that school principals must "be aware of hegemonic or power relationships. There is a power differential there". He felt that principals need to continually ask, "Do teachers perceive that you are behaving properly?"

Principals were generally reluctant to respond to my inquires about what happens "when the relationship might not be there." However, one principal indicated that those teachers within his school, who are on the periphery, choose to challenge decision-making by circumventing established protocols:

They just go out of the building right away and it turns into the parking lot chat or it ends up coming down [to central office]. And, if it's given any merit [by senior administrators], then they tell the next person that has an issue, "You just do this, it worked for me last time."

As I reflected on this data, I noted that the "teachers on the periphery" could also be viewed as assuming a leadership role with other school members – albeit in opposition to the principal's perspective or directive. Despite the principal's leadership, these "teachers on the periphery" had considerable influence over other teachers and school members despite the fact that they were promoting a vision that was different from or in direct opposition with the administration's plans. Spillane's (2006) recently published research supports my findings suggesting that "leaders can strive for different or even conflicting ends while working in parallel or even while co-performing leadership routines" (p. 68). The recognition that leadership takes place in the interactions of leaders, followers, and the situation, even when there are conflicting perspectives, is only one facet of leadership analysis.

Implicit in the constructions of the principal respondents' belief about distributed leadership was that performance is negatively impacted when people feel alienated and powerless. Fostering ownership was described as enabling others to contribute more effectively to school improvement efforts. One principal stated:

There's just ownership on every aspect of the way the school is run. There are more people buying into that ownership. We've now included our counsellors...and other staff members are also coming into our meetings....We are a new team and so there is the feeling that some teachers were nervous about us and making decisions...for them. Now all of sudden it's to the point where they're inviting us to go ahead and make decisions without their input because they just trust that we're going to make the right decision.

Principals also reported that Alberta's school-based decision-making reforms have allowed for greater ownership and broad-based involvement. In particular, they emphasized how teachers and other staff members were actively engaged in making critical decisions at the school level (e.g., decisions related to school policies and instructional programs).

Principals spoke about distributed leadership as an effective strategy to create "buy in" or "build consensus" around school mission and plans. Principals repeatedly described how shared vision evolved from the meaningful involvement of others throughout the school community. However, shared vision was more likely, one principal argued in contrast to the other participants, if the formal leadership team held common beliefs and goals and if the team communicated consistently:

I'd hear teachers go "Yeah, well this administrator tells me this and the other administrator tells me that." We stick up for each other. We might not always agree, but we can agree to disagree. I know when I first started as a vice principal... [the teachers would] say, "You know I'd rather you deal with this one. Because when that guy deals with it you know it might get handled differently." Now we do so much tag teaming that people feel like it doesn't matter who they take a problem to – they know what they're gonna get.

In this instance, I discovered that little space seemed to exist for those school members who challenged the leadership team's vision – only those who supported the principal's vision or the team's plans were invited to participate in the more formal leadership group. Principals expressed feelings of vulnerability when speaking about people or

situations that threatened the coherence that they deemed essential to school improvement.

One participant argued that school improvement was enhanced through the authentic involvement and participation of others:

True leaders are in the business to enable others to be the best that they can be...Not one of us is as smart as all of us...I think the key role of a principal is to work with kids to be the best that they can be...to work with parents...to work with teachers...to work with all members of the school community.

Considering how all stakeholders may potentially enhance student learning, one principal declared that problems are better solved collectively because "the parents are part of the answer. The teachers are part of the answer. Everyone feels like they're contributing to the whole ... So it's a total team approach." However, it was observed that non-traditional perspectives of school leadership (beyond teacher leadership), related to influence and inclusion, were rarely considered within school improvement efforts.

When asked about the effectiveness of using distributed forms of leadership, most principals provided ambiguous and simplified descriptions of how distributed leadership potentially impacts teaching and learning. Few qualitative descriptors were provided and most comments reflected common rhetoric espousing student learning as a priority:

Kids come first...it's the most important thing. Any decision that I ever make in the building is for the betterment of kids. It might not, necessarily be the best decision in some of the staff member's eyes, but I can go to sleep every night and feel comfortable.

Pondering, "What kinds of things can we be doing to support teachers in their efforts to increase student learning?" a central office administrator stressed:

Continually looking at what we are doing and what we can do to improve our practice that ultimately serves children. In my mind, we should always be questioning what we are doing – Are we doing this well? Effectively? But ultimately for children?

Distributed leadership was not merely used as an analytical tool for principals to consider leadership practice, rather, it was often employed as a tool to promote change and school improvement.

### ***Barriers to Distributed Leadership***

Many principals reported diminishing levels of quality and satisfaction with their professional lives and described numerous disincentives associated with the principalship that made it challenging to engage in focused and sustained school improvement. One principal stated, "I don't know if that's the case in the entire province, but I can tell you in our district that we get onto too many bandwagons. Everyone is going in so many directions." A newly-appointed principal indicated that the distribution of leadership helped him delegate tasks and shift responsibilities to make his work more manageable. On two occasions, distributed forms of leadership were identified by principals, in the early stages of their careers, as critical to "survival" within the current climate of reform. Such comments left me wondering if distributed leadership served as a guise for the delegation of administrative responsibilities. In these cases, little consideration was given to organizational interests and the expansive distribution of power. Rather, these principals focused on alleviating managerial workloads in an effort to enhance their capacity and time to focus on instructional matters. Through the delegation of tasks to teachers in rigid and closed roles, some principals felt that school operations were more effective and efficient. Several principals used distributed forms of leadership to squelch dissenting views or to avoid conflict – key, influential teachers were chosen to introduce or promote new initiatives with the larger staff. By developing structures and processes to promote change in managerial leadership processes (e.g., regularly scheduled grade-level collaboration meetings), teachers "were kept busy. There was less time for them to cause trouble or to derail our plans." Illuminating how the delegation of administrative responsibilities masquerades as distributed leadership, such findings elucidate the critical difference between authentic and counterfeit forms of distributed leadership.

During the interviews, many principals referred to time, practices and policies – much of which is out of the principal's direct control – that are barriers to distributed leadership. Rarely did participants interrogate ethical issues inherent in any "social

engineering" process. In a similar vein, the discussion of power differentials is also limited in Spillane's distributed framework. The use or misuse of positional power was evident as principals spoke about "planting seeds" with select teachers, or "allowing" certain teachers to "take the floor" or have more "air time" during staff meeting discussions. The role of the principal and micro-politics inherent in distributed forms of leadership were rarely subject to critical analysis. Moreover, principals described the "teachers on the periphery" as "outsiders," "not team players," "negative", or "always with a black cloud [above their heads]." Conflicting viewpoints and opposing values were "dealt with" or "ignored and they eventually go away." Other principals chose to directly "deal face-to-face" with individuals that were not supporting the administration's plan. One principal spoke at length about "getting folks on-side" and how "teacher leaders can get others on board faster." When faced with a teacher who failed to get "on board", this principal described how:

I had to be the jerk in the school...the mean guy that had to prompt her to get to that point but that I can deal with that. If I see that it's creating that culture, that environment [that this principal is seeking], and there's been some growth, then that was a win. That individual [teacher] still hates my guts, or doesn't enjoy me, or doesn't respect me as a leader but at least they're doing what I want them to be doing...We expect that in our classrooms and yet, sometimes I find, we, as teachers, are the worst. That's the part that's frustrating is that we're actually piloting an anti-bullying program and I have a couple of staff members that are the worst bullies. But yet, they're the first ones to fire the kid down to the office for me to deal with because the kid is bullying.

Findings clearly suggested that positional power and relationships may be used and misused under the guise of creating common purpose or a shared vision for school improvement.

During the course of the *ROP Institute*, it was evident that the discourse and interactions at the *ROP Institute* changed when the superintendent and other senior administrators were present. Similarly, at the school level, the presence of the principal within smaller teacher-leader meetings appeared to influence interaction patterns. One assistant principal indicated that "who talked, what was discussed, and the decisions made" shifted when his principal attended teacher-led meetings. Emerging discourses, at the school and district levels, were manifestations of these interactions. Those

holding positional power (i.e., the principal, superintendent, or other formally designated leaders) appeared to significantly influence these interactions.

Despite having multiple opportunities within the *ROP Institute* to engage in individual and collective reflection, principals rarely challenged the routine and insular context of the formal position and power inherent in the principalship. Although Sergiovanni (1991) proposes that "successful leaders know the difference between power *over* and power *to*" (p. 137), my findings suggest that few principals had an awareness of how power, control, and inequity continually shaped their own and other's experiences. In fact, even the "power *to*" pervasively and silently operated to monitor, classify, and control (Jardine, 2005, p. 55). However, one participant noted, "You need to hold up the mirror to yourself ... What do I need to do differently to change? ... You're a big variable in the equation." For this principal, examination of power differentials provided her with greater insight into the potential effects of her own actions within a distributed leadership framework. Spillane's distributed framework could become a more richly-textured leadership conceptualization by considering, questioning, and critiquing the authority and influence of the school principal.

Despite a desire to distribute leadership among school members, principals lacked the means to recognize teacher-leaders (e.g., providing remuneration or incentives such as release time from teaching responsibilities or appointments to formal leadership positions). In Hillview, principals had little autonomy in regard to staffing decisions. Several participants reported having protested a policy decision that limited their capacity to expand formal leadership networks within their schools:

We have a policy here on vice-principalships and there are thresholds ... It doesn't acknowledge the realities.... But what's the difference when you administer a school of 180 and 220 [students]? There is no difference, but that threshold is there.

Principals suggested that within the current policy context, this was one of many structural, cultural and micro-political barriers they faced. Despite dispelling notions of the "heroic" principal, tension existed as principals navigated between "top-down" and "bottom-up" approaches to building leadership capacity. One principal simply stated, "Sometimes I need to ensure that things get done and are done right and in a timely



manner. I just take care of those tasks and make those decisions by myself.” As principals tried to implement distributed forms of leadership by relinquishing decision-making authority to others in the school, they faced a serious tension with the all-pervasive culture of accountability in which principals operate vis-à-vis their senior-level district administrators and external stakeholders. When asked about expectations to magnify individual and organizational potential, principals were not always confident that pooling the expertise of school members was more effective and efficient than relying on more directive leadership approaches.

Tension around the issue of influence and inclusion were magnified within Alberta’s culture of accountability. One principal critiqued recent discourse about the broad-based involvement of the school community. He reflected, “We can say that we’re site-based management but we’re not. We’re so far from site-based management. It’s a top-down decision [implementation of a proliferation of educational improvement initiatives from the district and province] and you’re expected to follow those.” In a similar vein, another principal described the tension between school, district and provincial needs. He stated,

The problem then is that you have important things that are coming down from the Minister [of Education]...that have to be done. I mean you are told. The problem then is that might not be something that’s really fitting your guiding principles, yet you are expected to do it.

He continues to explain that “I personally feel [principals] probably aren’t as recognized in our District as they should be. They’re sometimes maybe viewed more of the middleman...I’ve had a real tough time with that.” There seemed to be a great degree of ambiguity surrounding the impact of school improvement structures and policies on principal’s roles as they negotiated dissonance among competing discourses and contradictory practices of the current reform context. Although Alberta’s reform policies appear to decentralize accountability, the school principals felt that there was a simultaneous move to centralize and control the educational system.

Principals also indicated that they have little latitude to initiate change and be reflective within school improvement efforts. One principal maintained, “I really can’t see how my day could be structured differently, as it really isn’t ‘mine.’” For another

participant, he expressed frustration navigating stakeholder views and policy directives that were in conflict with his own values. He shared:

One is, do I have the skill set to do what I'm being asked to do? And two, how do I really feel about what I'm being asked to do? I think the bigger challenge is to work and get some kind of common understanding of how we feel about what it is we're being asked to do with kids.

Illuminating the inevitably value-laden nature of leadership, several principals described ethical dilemmas associated with being "asked" or "mandated" to engage in certain improvement initiatives that were in opposition to their own, or their school community's values. Nonetheless, the commitment or "buy in" of teachers was secured more quickly when school members, other than the principal, actively promoted school reform initiatives. I left the Hillview jurisdiction wondering if it was even possible for these principals to be reflective when their identity as instructional leaders was so clearly defined by policies and practices indicative of predictable structures and predetermined responses for problem-solving and decision-making.

### **Implications for Practice and Further Study of Educational Leadership**

When operating from a technical-rational perspective, principals may provide managerial responses that preserve the status quo as defined by institutionalized practices. This worldview shapes, and to a great extent, limits understanding. Although organizations exert great influence on those who work in them, Spillane's framework validates Greenfield's (1993) premise that organizations are created through human intention and decision-making and maintains that principals have a great degree of autonomy regarding leadership practice. The *ROP Institute* participants embraced distributed forms of leadership to enhance individual performance and organizational learning.

This study illuminated several implications for the practice of school leadership, including the need for principals to avoid "context-neutral, task-generic templates designed to script leadership practice" (Spillane, 2006, p. 100). Rather, principals need to deconstruct conscious and unconscious beliefs about leadership by reflecting *on* leadership practice through an investigation of lived routines and formally-designed

structures. By analyzing key artifacts and processes through competing theories and metaphors, principals can “explore, elevate or diminish the significance” of what is seen and generate new insights and opportunities to enhance leadership practice (Morgan, 1998, p. 316).

This study elucidated the need to attend to affective and motivational dynamics that impact group interactions and individual motivation. Both physical and metaphorical space must exist to disseminate diverse ideas and to reduce principal and teacher isolation. Study participants emphasized how social trust must be developed for dialogic interactions to support individual and organizational learning (Greenfield, 1993; Ryan, 2006). Social trust was enhanced as principals distributed leadership in ways that provided differing school members with broader involvement (Murphy & Beck, 1995). Additional research is required to explore, in greater depth, the effects that distributed leadership practices have in morphing extant notions, conceptualizations, and lived experiences of “power” within our schools and the larger educational system.

Professional development and collective inquiry, as described by *ROP Institute* principals, was critical as they navigate continuous technological, societal, economic, and political change. Within the context of this study, implications for the preparation and ongoing education of principals were also illuminated. Firstly, professional development that was reported as meeting the perceived needs of principals was comprised of both academic and theoretical learning that was embedded within practical school-based problems or administrative issues. In particular, using action research as the instrumental focus of a principal professional development approach enabled principals to focus on a concrete issue of importance to them (for many participants, the foci of the action research projects emerged from the PQPS as they explored how instructional challenges and distributed forms of leadership may contribute to school improvement). Principals also argued that opportunities to engage in leadership development must extend beyond formally-designated leaders to include diverse representation from the school community (e.g., counselors, teacher leaders, parent council members).

Undoubtedly, the association of distributed leadership with a variety of organizational benefits will result in continued interest. However, to more fully address

Heck and Hallinger's (1999) "blank spots" and "blind spots", I argue that deeper understanding of distributed leadership needs to be garnered through descriptive methodologies such as longitudinal observations, interviews and case studies to ascertain the "quality of activity and its consequences" (Timperley, 2005, p. 417). Evocative cases viewed through a multiplicity of perspectives and comprised of rich descriptions of integrative practices may elucidate clearer images of the effective distribution of leadership. Implications for further study of school leadership, I suggest, include: (a) analyzing leadership practice at the school level, rather than emphasizing traits or roles of individuals (Spillane, Halverson & Diamond, 2001; Yukl, 2002); (b) understanding issues of teacher leadership, including observations of those who actively resist or passively avoid leadership or those who effectively create coherence through boundary spanning (Timperley, 2005); (c) engaging in discourse analysis to track patterns in interactions within formal and informal social networks (Halverson, 2007); and (d) engaging in systematic and in-depth inquiry into routines and artifacts that enable or constrain practice (Spillane, 2006). Further research is required to better understand the relationship between an "openness" to distributed leadership practice and the (a) principal's age, (b) principal's stage of administration career, (c) type of school, and (d) experience level of staff. Deeper understanding of the extent that distributed forms of leadership support school improvement and contribute to student learning and teaching performance is still urgently required (Harris, 2004; Leithwood & Duke, 1999; Young & Lopez, 2005; Yukl, 2002).

### **Conclusions**

In this paper, I reflected on socially-conditioned structures underpinning current understandings of leadership practice by focusing on the perceptions and experiences of principals engaged in professional development program to enhance instructional leadership practice in relation to Alberta's PQPS. As principals engaged in collaborative reflection and action research, they seemed to embrace notions of distributed leadership in their descriptions of "what is" and "what ought to be". In addition to their own skilful leadership, these principals saw benefits to sharing decision-making responsibilities by drawing on expertise where-ever it exists in the organization (e.g.,

other principals, teachers, parents). This view of leadership did not envision “the principal” as the singular leader in the school; in essence it served to broaden the group who make decisions and set direction for an organization such as a school. In addition, some principals carefully considered how a given situations, artifacts, norms, or practices either enable or constrain leadership practice that contribute to school improvement. Recognizing and welcoming varied and multiple sources of leadership with their schools, principals questioned notions of instructional leadership in which the principal directly manages and controls teaching and learning. Yet in most cases, participants agreed that differing contextual factors demanded both “top-down” and more organic “bottom-up” leadership approaches. Similar to the goals of the *ROP Institute*, this study provided principals with the opportunity to reflect on the distribution of leadership in action.

In *Distributed Leadership* (2006), Spillane aims to make the “black box” of leadership practice more transparent – illuminating *how* and *why* leadership is naturally undertaken by multiple leaders in diverse contexts. Grounded in the everyday work of real schools, Spillane’s cogent analysis of distributed leadership generates insight into “how leadership unfolds within school settings as a shared, constructed phenomenon” (Heck & Hallinger, 1999, p. 148). At a time when there is consensus among practitioners, policy makers, and academics of the need to fundamentally rethink school leadership, I emphasize that, notwithstanding these criticisms, Spillane’s distributed framework (2006) makes an important contribution to understanding leadership practice.

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