

**Teacher Leadership: Lived Experiences of
Community of Learning | Kāhui Ako Across Schools Teachers
in Aotearoa | New Zealand**

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ABSTRACT

This doctoral study was designed to investigate the lived experience of newly appointed across-schools-teachers (AST) in a leadership role within an Aotearoa | New Zealand government initiative titled Communities of Learning | Kāhui Ako. This initiative had two driving intentions: to raise the achievement of ākonga (learners) and to retain effective and experienced educators in the profession by providing alternative career pathways. The essential conditions and mechanisms for effective teacher-leaders to emerge, be successful in their role, and develop a strong sense of professional identity, formed the focus for this study.

The study is divided into two phases and uses an exploratory sequential mixed methods design to gather data to explore the phenomenon. Phase 1 involved investigating the experiences and perspectives of 154 existing and recently employed ASTs through the administration of an electronic Qualtrics questionnaire. Participants who completed Phase 1 were able to volunteer to participate in Phase 2, transcendental phenomenological qualitative interviews. Phase 2 involved interviewing 28 volunteer participants to gain an in-depth understanding of their lived experience as a teacher-leader within this new initiative and how that experience had shaped their professional identity development.

The study found that the participants' experiences were on a continuum of extremes, from those who experienced being disappointed, undervalued, underutilised and professionally unsafe, to those who found the role meaningful, highly rewarding and at times euphoric. The extreme variation of experiences significantly impacted the participants' effectiveness in their AST role and shaped their professional identity development accordingly. These findings provide insights into the contextual and unique lived experiences and perspectives of ASTs. This study found the most significant aspect that impacted the participants' experience as an AST, that superseded the actual role itself, was the complex ecology of the professional landscape. These findings alongside other empirical evidence form the basis for proposed

teacher leadership and professional identity frameworks. Considerations and recommendations for designing and implementing future teacher-leader government initiatives are presented to support mitigation strategies undermining the gaps between the intent and expectations of a policy initiative and the subsequent enactment and experience of implementation in practice.

DEDICATION

In appreciation of educators who do what they do as a service to others.

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Ehara tāku toa i te toa takitahi engari he toa takitini

My strength is not as an individual but as a collective

This whakataukī (proverb) epitomises for me the key value for anyone who commits to a doctoral study journey – it is not one that you can take on your own. There are many people to thank for their unwavering belief and investment in me as a person and as a colleague. I am unable to do justice in this brief acknowledgement and instead will do so personally; however, it is appropriate to mention a few here.

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GLOSSARY OF ACRONYMS AND DEFINITIONS OF TERMS

ACET	Advanced classroom expertise teacher
AST	Across-schools-teacher
ERO	Education Review Office
IES	Investing in Educational Success
Kāhui Ako	Communities of Learning Kāhui Ako Formally known as Communities of Schools, often referred to as COL. Kāhui Ako is a te reo Māori phrase to describe a community of learning. <i>Kāhui</i> , refers to a swarm, flock, cluster, or company and the word <i>ako</i> refers to reciprocal learning (Moorfield, 2019).
Kāhui Ako leader	Community of Learning Kāhui Ako leader often referred to as a lead principal(s)
MOE	Ministry of Education Te Tāhuhu o te Mātauranga
NANP	New Appointments National Panel
NZCER	The New Zealand Council for Educational Research
NZEI	The New Zealand Educational Institute Te Riu Roa,
PPTA	Post Primary Teachers' Association Te Wehengarua
SCT	Specialist classroom teacher
SENCO	Special education needs co-ordinator
SPANZ	Secondary Principals Association of New Zealand
WST	Within-school-teacher

The use of te reo Māori and the interchange with English is intentional throughout this thesis to honour our official languages of Aotearoa | New Zealand. A translation will be provided in the first instance.

CHAPTER 1: Introduction

1.1 Researcher Motivation and Positionality

In 2014 Communities of Learning | Kāhui Ako (Kāhui Ako) were introduced into the Aotearoa | New Zealand public education system as a government initiative with the goal of creating a whole system change. This development provided significant opportunities and challenges for many leaders and teachers who were appointed into the newly designed leadership roles (ERO, 2019). My personal motivation to complete this research study came primarily from my own alternative educational career pathway and supporting colleagues through theirs. I was the first nationally appointed Kāhui Ako across-schools-teacher (AST) in 2016. This teacher-leader role was unlike any other state school leadership position available, and my experience of the role was equally frustrating and exhilarating. My experience in this school-based role led to me being offered the position of a Kāhui Ako lead advisor in the Ministry of Education | Te Tāhuhu o te Mātauranga (MOE) in Auckland where I had the privileged opportunity to advise and support others through their own Kāhui Ako journey for 4 years. A strong motivation to embark on this research study was to give voice to those teacher-leaders, who like me, embraced a new way of working and took the leap of faith into an unknown role.

Researcher positionality refers to where one stands in relation to others (Merriam et al., 2001). On Herr and Anderson's (2005) continuum of positionality I was someone who conducted a study within a community of which I was also a member at the time, therefore, an insider-researcher (Asselin, 2003). The positioning of an insider-researcher has both disadvantages and advantages. Mitigation strategies to negotiate any disadvantages are presented in Sections 3.2 and 3.3. An insider-researcher has the advantage of tacit knowledge and the benefit of understanding many of the existing practices in the setting (Herr & Anderson, 2005). I could have started the research process at any number of entry points created or highlighted by personal, professional and political influences in my own life (Schram &

Caterino, 2006). My personal experience as an AST in 2016–2017 and then MOE lead advisor from 2017–2021 created both my positioning and entry point into the study of teacher-leadership and professional identity development within a government initiative.

1.2 Significance of the Study

The Kāhui Ako government initiative has been described by one of New Zealand’s teachers’ unions as “the biggest change in education since the Second World War, requiring behavioural change rather than merely structural change to be effective” (Post Primary Teachers’ Association [PPTA], 2017a, p. 6). Yet there has been no large-scale nor consistent formal evaluation of this initiative despite the significant financial investment by the government. It has also been argued by educators and academics that there is an undermining gap between the intent and expectations underlying the implementation of Kāhui Ako and the subsequent enactment and experience of implementation in practice (Education Review Office [ERO], 2019; PPTA, 2017a; Thrupp, 2017; Wylie, 2016).

This study represents an original contribution and provides insights from the perspective of the teacher-leaders in AST roles. Those insights are then integrated with empirical evidence from the international literature relating to teacher-leaders, teacher leadership and professional identity development to gain an understanding of the impact of initiative implementation, challenges, and successes. The theory and empirical findings generated from this research project intends to contribute to the field of teacher-leader roles generated within a government initiative. This study also provides relevant information and recommendations that could help to guide those who are tasked with supporting those employed within the roles these type of initiatives generate.

1.3 Research Question

The aim of this study was to investigate the experiences of teacher-leaders within the Kāhui Ako government initiative and understand how their leadership opportunity impacted their professional identity development. Due to the innovation and significant complexity of this initiative, this investigation was divided into two separate, but interrelated, phases designed to answer the research question. Phase 1 consisted of electronic Qualtrics questionnaires and Phase 2 consisted of transcendental phenomenological participant interviews.

Tashakkori and Creswell (2007) stated a strong mixed methods investigation starts with a strong research question. Furthermore, in transcendental phenomenology the research question is the driving force of the study that encompasses the phenomenon of interest (Moustakas, 1994; Van Manen, 1990). Moustakas (1994) described the research question as a guide and focus of an investigation, where the entire process leads back to the question as a focal point to or understand the true phenomenon – the lived experience.

Research Question: How do Kāhui Ako across-schools-teachers experience their professional identities as teacher-leaders within a government initiative?

1.4 Aotearoa | New Zealand Educational Context

The purpose of this section is to provide a brief context of education in New Zealand. Additionally, career initiatives preceding Kāhui Ako, such as the senior subject advisor (SSA), specialist classroom teacher (SCT) and advanced classroom expertise teacher (ACET) are also presented to provide the context within which this study is situated and the relativeness of these roles to the AST role.

1.4.1 New Zealand Education

New Zealand is a small island nation of approximately 5.2 million people in the Southern Hemisphere. Early childhood education (ECE) is not compulsory; however, around 96.8% of

tamariki (children) attend ECE (MOE, 2023c). There is a range of early learning opportunities for a te tamaiti (child); these opportunities can be matua (parent), whānau (family) or kaiako (teacher) led. Schooling is compulsory for all tamariki from 6–16 years of age and the compulsory education system consists of 13-year levels. There are state, state-integrated, private, special character and kura kaupapa Māori (Māori-medium) educational institutes available for caregivers to choose from (MoE, 2023c). An ākonga's (learner) primary education starts at Year 1 when they turn 5 years of age and continues through to Year 13, completing their secondary education around 17–18 years of age (MOE, 2023c). There are approximately 800,000 ākonga attending compulsory education each year mainly at free state education institutions (Education Counts, 2023).

From 1877 until 1989, New Zealand ran a centralised education system through the Department of Education. In 1989 the Ministry of Education | Te Tāhuhu o te Mātauranga (MOE) was formed in conjunction with the Tomorrow's Schools reform following the release of the *Picot task force report* findings (Openshaw, 2009). The Tomorrow's Schools reform policy texts included “social democratic partnership rhetoric, positioning principals as professional leaders working collaboratively with elected parent boards of trustees” (Court & O'Neill, 2011, p. 120). The ideology of “self-managed” schools was promoted on the premise of allowing parents more say in their children's education and local school administration (Court & O'Neill, 2011). Conversely, school self-management has resulted in much greater competition between schools for students:

The cumulative effect of New Zealand's experience of school self-management has been corrosive. It has not improved student engagement and achievement, or reduced achievement gaps between students from poor homes and others, or between indigenous Māori and European New Zealanders. (Wylie, 2013, p. 40)

Furthermore, as “professional leaders,” principals were given new responsibilities making the role far more complex and demanding of their time (Fitzgerald & Gunter, 2006). Ultimately, the reform made it difficult for principals to take sole responsibility for the successful management of all aspects of their school. New Zealand principals spend more time on administration than do many of their international counterparts (Wylie, 2013). This has led to the development of a hierarchy in schools including tiers of senior and middle leaders (Cardno, 2012).

Union presence and representation is a strong force in the New Zealand education sector. Approximately 50,000 early learning and primary teachers are members of NZEI | Te Riu Roa (NZEI) and 20,000 secondary teachers are members of Post Primary Teacher Association | Te Wehengarua (PPTA) (PPTA, 2023a). Many joint bargaining claims have developed over the years through collaboration between NZEI and PPTA members focussing on ensuring that the teaching profession is valued, recognised and equitable in working conditions across the teaching year levels. These unions lobby to address members concerns such as teacher shortages; additional staffing and / or time to address workload; salary, relativity and meaningful new career options for educators (PPTA, 2023a). For the context of this study and the introduction of the new Kāhui Ako AST role, it is important to recognise that the status of wanting to be, and continuing to stay, a teacher is consistently influenced by teachers’ working conditions. These conditions include the need for “high levels of participation in continuous professional learning and development, opportunities to progress within the profession and competitive salaries that are appropriate to the nature of the work” (Cordingley et al., 2019, pp. 4-8).

1.4.2 Teacher Career Initiatives Previously Introduced in New Zealand

It can be claimed that compared with many other professions, teachers volunteer generous amounts of time and effort to participate in, and lead, both formal and informal educational

activities in and outside the classroom (De Nobile, 2023; De Nobile & Ridden, 2014). Once early career teachers have solidified their teaching practice and gained some initial confidence, many look for ways to extend their influence and contribute from, and beyond, their classroom walls (Lovett & Cameron, 2011). Labelling and defining these different functions as part of formalised roles have historically been problematic (Kurt, 2016). It has also been stated that the teaching profession needs to evolve to meet 21st-century career expectations for a new generation of teachers by:

Creating the conditions necessary to develop sustainable teacher career pathways and potentially to make teaching a more attractive career option for a generation that expects flexibility in the workplace, collaborative work structures, differentiated roles, and compensation systems that recognize performance, and differing levels of responsibility. (Natale et al., 2016, p. 5)

Furthermore, the introduction of specific educational reforms, such as Tomorrow's Schools, has provided an opportunity for the significant expansion of the role of educational leaders (Cardno, 2012; Wylie, 2012). Additionally, leadership roles have begun to emerge and promise real opportunities for teachers to impact educational change without necessarily leaving the classroom (Rutherford, 2009).

During the work of the Ministerial Taskforce 2003, and in the 2004–2006 career-pathway work streams, unions, and the New Zealand School Trustees Association (NZSTA) were involved in joint initiatives with the government. The purpose of this work was to support teachers in their professional roles and identify resourcing to be linked to existing career pathways. Considerations were also given to providing alternative career pathways with the aim of retaining teachers in the profession through the provision of a range of career and professional growth opportunities (PPTA, 2009; Rawlins et al., 2015).

In 2009, a PPTA executive conference paper provided an update to delegates on progress in these career pathways work streams. In that paper, it was reported that discussions were beginning to settle around a range of broad pathways with: “new career pathways being developed which recognise educational leadership, teacher induction and mentoring, student guidance, ICT [information and communications technology] and extra-curricular specialisms” (p. 3). The recommendations also signalled that these career pathways would be “underpinned by improved professional development and new, teaching-focussed qualifications” (p. 3).

1.4.2.1 Secondary Senior Subject Advisors Pilot. One initiative that was reportedly highly successful, but short-lived, was the Senior Subject Advisors (SSA) pilot (PPTA, 2009). The SSA pilot was an initial attempt to offer a career pathway to experienced teachers who might otherwise have decided to leave the classroom. The pilot project existed from January to December 2007 and provided funding for the secondment of 24 full-time, experienced, and effective senior subject teachers to advisory positions, hosted in existing school advisory services institutions (M. Taylor et al., 2011). A study evaluating the effectiveness of this initiative by M. Taylor et al. (2011) comprised of a survey and interviews of three participant groups which included 22 SSAs, their regional managers, and teachers receiving support services from the SSAs. Those SSAs surveyed at the end of the pilot:

Were reluctant to view the role as an authentic career pathway in terms of teaching; indeed, it was a specially funded initiative with an uncertain future, so this position was a pragmatic one. Instead SSAs viewed the role as a career loop or opportunity, after which they would return to their previous job, for better or worse. (p. 91)

Additionally, a few SSAs proposed that, although they were returning to classroom teaching, it might be to another school where they felt they would be in a better position to utilise what they had learnt. A perhaps unexpected consequence of the initiative was that a significant proportion of the SSAs saw the pilot as an exit opportunity and intended to seek employment

in a full-time advisory position or other teacher education roles rather than continue working in schools, therefore an alternative career pathway within education but away from schools (M. Taylor et al., 2011). These findings from the SSA pilot were important to the context of this study and the AST role due to the similar limited funding over a time period and the potential for exit opportunities as a result of the professional growth the new role provided. Another relevant initiative that was introduced during the same time period as the Kāhui Ako initiative was the advanced classroom expertise teacher (ACET).

1.4.2.2 Primary Advanced Classroom Expertise Teacher. ACET was introduced as part of the settlement of the NZEI Primary Teachers' Collective Agreement 2013–2016 to recognise exemplary practice in primary teaching (TeachNZ, 2023). The stated intention of the initiative was to provide an alternative career pathway for teachers who wanted to stay in the classroom and who had developed their expertise to a level above that of the experienced teacher professional standards. However, in truth ACET is more a status and allowance given to a teacher. The ACET recognised teacher received an ongoing allowance of \$5,000 per annum with the mandate of “in keeping with this alternative career pathway purpose, ACET recognised teachers were not expected to undertake additional tasks as a consequence of receiving the ACET allowance” (TeachNZ, 2023, para. 3). Due to an allocation process only a maximum of 800 ACET allowances were available from 28 January 2015. It could be argued due to the lack of further requirements attached to this additional salary allowance the ACET initiative was more of a performance-related pay initiative rather than an alternative career pathway. This development is important background policy context for this study considering the introduction of the Kāhui Ako roles was during the same time period. Further developments since the introduction of the ACET allowance that impact the sustainability of the proposed alternative career pathway are stated in the NZEI Primary Teachers' Collective Agreement dated July 2023 to July 2025:

From 1 January 2023, no new Advanced Classroom Expertise Teachers shall be recognised and no new ACET allowances paid; current holders of an ACET allowance continue to be eligible according to the provisions of clause 3.32 unless and until they lose eligibility, at which time the allowance ceases and cannot be reinstated. (NZEI, 2023, p. 25)

There were also policy alignment issues between the ACET and Kāhui Ako initiatives which are discussed in following sections.

1.4.2.3 Secondary School Specialist Classroom Teacher. Arguably, the most significant and thus, far, sustainable secondary teacher alternative-career-pathway government initiative is that of the specialist classroom teacher (SCT). The SCT role was part of the 2004 PPTA collective agreement and was implemented as a pilot project in secondary schools across New Zealand in 2006, reviewed, and then extended to all secondary schools in 2007 (PPTA, 2012). All secondary schools are entitled to employ one permanent SCT for 4 hours per week. Larger schools (1,201 students and over) are entitled to employ an individual teacher for an additional 4 hours, 8 hours per week in total. The position requires the payment of two management units or \$10,000 / annum remuneration package as of 28 January 2020 (PPTA, 2023). There are some consequential similarities between the origins and performance expectations of the specialist classroom teacher and Kāhui Ako roles, especially the AST role.

The policy intention of the SCT role is one of support and guidance, and for experienced teachers to operate with their teacher colleagues in a high-trust and confidential relationship rather than appraisal, performance management or competency judgements (PPTA, 2012). These distinctions are not explicitly explained in the Kāhui Ako policy; however, two key purposes for the SCT position articulated have significant similarity to the Kāhui Ako policy. Firstly, the intention of the SCT role was to contribute to the enhancement of quality-teaching practices in schools by supporting the professional growth of other teachers. The ultimate

impact of these enhancements on the quality of teaching was expected to contribute to high educational outcomes for all secondary students, particularly those most at risk of underachievement (Ward, 2007). The second intention of the SCT role was to contribute to a broader more attractive range of career prospects for secondary teachers. The SCT initiative has been seen to positively contribute to the retention of experienced teachers, particularly those who wished to focus on professional teaching practice (Ward, 2007).

Ward's (2007) review of the SCT role directly relates to the focus of this study and the policy intention of the AST role as an alternative career pathway for teachers including the perceived problem with the linear picture inherent within the word *pathway*, due to the idea that pathways have a single direction. Additionally, senior-leader participants expressed that the SCT role did not provide a career pathway as they did not see it leading on to senior management roles due to insufficient experience in administration or management (Ward, 2007). The review presented a range of different definitions regarding rationales for teachers considering applying for the SCT role that were used as a structure for the recruitment motivation questions in this study:

The role is a *stepping stone*: one step on their way from the classroom towards senior management and the next stone is likely to be middle or senior management;

The role is a *constructive downsizing*: an alternative career choice for those that have had middle and senior management roles and have now decided to return to the classroom providing senior teachers with an alternative to staying in management;

The role is a *career choice*: for teachers who have never wanted a management role or for whom there has been no recognised leadership position available. The SCT role provides them with an opportunity to utilise their expertise and knowledge while remaining focussed on classroom practice;

The role is an *interesting interlude*: for these teachers, the role was a chance to try something different. Many may decide to make it a career choice; others may return to their management or classroom roles. (Ward, 2007, p. 170)

A key development since the introduction of the ACET, SCT and Kāhui Ako roles relates to the consideration in the future of another role called an *expert teacher*. At the annual PPTA conference in 2019, a paper titled “Developing a Career Structure for Subject Experts” was presented that proposed a similar type of identification and pay incentive as the ACET teacher, for secondary teachers. The paper proposed a career structure that would allow expert teachers to remain in the classroom. It stated that the expert teacher role would be different from the SCT and Kāhui Ako roles in that it would prioritise “the teaching aspect” and that “its inception will contribute to raising the status of teaching” (PPTA, 2019, p.19). At the time of submitting this thesis, this proposed expert teacher role had not been implemented into the collective agreement. In summary this section outlined the previous attempts of teacher unions and government officials to provide proposed alternative career pathways for teachers. Whether these initiatives could be described as genuine sustainable career pathways is debatable. Nevertheless, these prior policies and employment related positions provide context for the policy intention and design of the Investing in Education Success policy, which is introduced in the next section.

1.5 Investing in Education Success Policy Initiative

In this section, Kāhui Ako and the AST role are situated within the context of the Investing in Education Success (IES) policy initiative. The definition of policy relates to governmental statements such as a law, regulation, ruling, or order (Birkland, 2019). The stages of policy making begin with setting the agenda, then designing, and adopting formal legislation, resulting

finally in school implementation (F. C. Fowler, 2000). In January 2014, the National-led¹ government announced a significant financial injection into the education sector of \$359 million over 4 years, and \$155m each year after that, through the voluntary IES initiative (MOE, 2016a). IES was designed to provide “targeted tools and resources to build teaching capability and improve learning and achievement for all students” (MOE, 2016a, p. 2) through three main initiatives:

- 1) Communities of Learning | Kāhui Ako.
- 2) Teacher-led innovation fund (TLIF) for teachers to carry out inquiries.
- 3) Principal-recruitment allowance to enable struggling schools to attract principals who had proven themselves to be highly effective.

This study primarily focuses on the Kāhui Ako policy initiative and the role of the AST. Like many government initiatives, the original intention of the policy evolved and changed in response to developments and pressures, including the change of name to Kāhui Ako | Community of Learning from the original Community of Schools. The rationale for the change was that the “term better reflects the original intention that a community focus is on the learner’s pathway and can involve organisations outside the compulsory education sector” (MOE, 2016a, p. 1; PPTA, 2017a). Kāhui Ako is a te reo Māori phrase. *Kāhui* refers to a swarm, flock, cluster, or company, and *ako* refers to reciprocal learning (Moorfield, 2019). Debatably, still retaining the original across-schools-teacher title does not follow the same rationale. This oversight was perhaps due to the titles of the appointed roles within the Kāhui Ako were embedded in the respective teacher collective agreements and therefore more difficult to change out of a collective bargaining cycle.

¹ IES as a policy existed within two different governments, National-led 2014 - 2017 and then the opposition Labour-led government from 2017-2023.

The policy documentation explained that a Kāhui Ako would consist of a group of schools in a geographic area serving a community. This included approximately 10 state, state-integrated schools or kura² that would normally be the institutions containing Year 1 to 13 students. The rationale for the cluster groups of 10 related to the number of Kāhui Ako that could originally be formed due to the budget constraint of 250 Kāhui Ako leader roles available (MOE, 2016a). As of August 2023, the 221 Kāhui Ako nationally ranged from a minimum of three schools / kura through to more than 14 schools / kura plus numerous early learning and tertiary providers. A total of 3,521 early childhood providers, primary, secondary, special character and specialist schools, teen-parent units, and tertiary providers across New Zealand were members of Kāhui Ako at the time of writing this thesis (Education Counts, 2023).

The government's intentions for the Kāhui Ako policy initiative were twofold. The first intention was to enhance equity and excellence and raise the learning and achievement of all learners, particularly those at most risk of underachieving (Greany & Kamp, 2022). One of the driving forces behind IES was Education Minister Hekia Parata (see next quote):

The aim of Investing in Educational Success is to enable expertise and resources to be better shared by creating communities of learning that bring together all those with an interest in a child's education once the new communities have identified the achievement challenges, they wish to focus on and appointed key personnel they will be able to begin sharing expertise and accessing additional resources. The challenges identified by individual communities of learning will differ according to need. For some it will be literacy, for others it might be maths or science, and, in Auckland, some are likely to identify challenges associated with teaching students for whom English is an additional language. (Parata, 2015)

² Kura is the Māori word for school and typically refers to a Māori Medium school.

In an attempt to enhance equity and excellence, the Kāhui Ako initiative promoted the theory that by “encouraging greater collaboration between schools; recognising, supporting and using professional expertise across the system; enhancing opportunities for teacher-led innovation of new and good practice, to make clearly visible what is possible, new and exciting” (MOE, 2016a, p. 2). Formalised collaboration was expected to result in significant and sustained improvement in students’ educational outcomes and address the needs of those at most risk to close the gap between underachievement and achievement (ERO, 2019; MOE, 2016a). Sinnema et al (2021) stated the goal of most multi-school networks such as Kāhui Ako are to “create the social conditions that enable teachers to make shifts in their knowledge, dispositions, skills and practice which positive influencing student outcomes” (p. 2).

The second intention of the Kāhui Ako policy was to retain educators in the profession by providing alternative career pathways (Key, 2014; PPTA, 2017a). The premise that the Kāhui Ako initiative would retain educators, especially in the classroom, was reinforced in the words of Prime Minister John Key (see next quote) to a West Auckland business group:

We want to keep top teachers in the classroom rather than having to go into management positions, or leave teaching altogether, to progress their careers. At the moment, our best teachers work their way up the career ladder by doing less teaching, and that shouldn’t be the way it works. We want to support a culture of collaboration within and across schools. That means the really good principals and teachers spend a lot more time sharing what they know, and how they work, with other principals and other teachers. We want the best teachers and principals to lead a change in achievement and we are going to pay them more to get it. (Key, 2014)

In summary the rationale given by the government for the introduction of the Kāhui Ako initiative was to raise learner achievement, especially for those who were most underserved, and to retain the services of the most effective teachers in the education system (Key, 2014; MOE, 2016a; Parata, 2015). The educational sector's reaction to the IES policy is discussed in Section 1.5.3.

1.5.1 Kāhui Ako Career Opportunities

The Kāhui Ako initiative provided funding for three new roles within each cluster to be established with the stated intention of overseeing and coordinating the work of the Kāhui Ako. The three roles were the Kāhui Ako leader, across -schools-teacher (AST) and the within-school teacher (WST) (MOE, 2016a). A Professional Standards Writing Group (the Writing Group) was commissioned to identify the knowledge, skills and understanding needed to be effective in each of the three new proposed roles (MOE, 2016a). The Writing Group developed criteria to support the selection of applicants, locating these criteria within a broad professional standards framework (MOE, 2016a). When establishing the prerequisites and the national criteria for the Kāhui Ako leader, AST and WST roles, the Writing Group stated it considered:

- The general intent of the IES initiative and the purpose and functions of the three new roles, as agreed by the IES Working Group (MOE, 2016b).
- Teacher Professional Learning and Development Best Evidence Synthesis (BES) work, particularly the four interdependent key influences on change identified as important at all levels of the system for sustained positive change: leadership of conditions for continuous improvement; productive inquiry and knowledge-building for professional and policy learning; effective pedagogy for valued outcomes for diverse learners; activation of educationally powerful connections (Timperley et al., 2007).
- The Registered Teachers Criteria and associated documents (MOE, 2016b).

1.5.2 Kāhui Ako AST Role

The stated intention established by the Working Group for the AST role was to promote best teaching practice across a Kāhui Ako and strengthen the use of effective inquiry approaches to teaching and learning to achieve the shared achievement objectives (MOE, 2016b). The AST role was intended to allow experienced teachers to use their skills and knowledge in new ways across their Kāhui Ako on the premise that teachers learn with, and from, their colleagues in cycles of inquiry and improvement. ASTs were provided with release time from their timetabled teaching to develop and encourage the sharing of effective practices that improve educational achievement (MOE, 2016b).

1.5.2.1 Terms and Conditions of the AST Role. The AST role remuneration included a \$16,000 annual allowance, 0.40 full-time teacher equivalent (FTTE) release time (equivalent to 2 days a week) and a \$750 per year induction fund plus a calculated travel allowance (MOE, 2016b). The AST role was both reliant on resourcing and was a fixed term contract. The number of AST roles available to a Kāhui Ako were generated by a combination of the collective number of FTTEs employed across the Kāhui Ako and the amount available nationally. Consequently, the number of available positions were susceptible to school roll growth and decline and these variations impacted whether positions could be renewed (MOE, 2016b). The government's rationale of "up to 2 years fixed term" (with right of renewal for a further 2 years) contract was due to the fixed term nature of the funding as well as allowing the flexibility to prioritise efforts towards key educational challenges with the right specialist people to fulfil those roles (Parata, 2015).

1.5.2.2 Recruitment and Employment of the AST Role. Prerequisites for eligibility, expectations of the AST role and conditions of work were entwined within the respective teacher collective employment agreements. Considerable industrial bargaining occurred with teacher unions to agree on the structure and resourcing of the AST role (MOE, 2014).

Prerequisites included being currently employed within a Kāhui Ako, having a current practising certificate, meeting the professional standards relevant to position as shown by the national criteria including appropriate teacher-leadership experience (MOE, 2016b).

1.5.2.3 The New Appointments National Panel. To assist with the principal recruitment allowance process, the appointment of the Kāhui Ako leader and AST positions the IES initiative resourcing also included funding the New Appointments National Panel (NANP). NANP was established in April 2015 with the agreement of the parties to the accord between the MOE, NZEI and PPTA. The panel consisted of up to 12 independent advisors “selected for their experience and expertise in the assessment and evaluation of teacher and leadership practice” (NANP, 2022, p. 4). The NANP advisors were contracted by the MOE to provide a service to Kāhui Ako selection panels to appoint and reappoint applicants. The advisors did not have a voting right on the successful candidate and their sole function was to assess and affirm whether the candidate met the established national criteria for appointment (MOE, 2016a). Ultimately, Kāhui Ako had total autonomy to appoint their preferred candidate as long as they met the prerequisites and national criteria. At the time of the start of this study, in June 2019, nationally, 200 out of 221 Kāhui Ako had appointed and reappointed their Kāhui Ako leader(s). Those 200 Kāhui Ako had employed a total of 551 ASTs and 2,510 WSTs, a combined total of 3,261 appointments in the three roles (Education Counts, 2019).

1.5.3 IES Policy Sector Reaction Critique

To provide context for this study, this section presents relevant critiques and evaluations related to Kāhui Ako within the overarching IES policy that have been published by academics, researchers, teacher and principal unions, government organisations and educational commentators, including PPTA, NZEI, MOE, ERO, New Zealand Council for Educational Research (NZCER) and NANP.

The introduction and implementation of the IES initiative provoked much controversy and debate. Educational commentators described IES as a polarising policy expressing that the sector was caught off-guard by the prime minister's announcement in January 2014. The main objections related to a perceived lack of consultation; lack of robust research to justify the policy; inequity of resourcing; lack of alignment with other leadership roles; concerns about recruitment and the perception of performance pay (Barback, 2014; Bendikson, 2015; Gilbert, 2015; PPTA, 2017a; Rawlins et al., 2015; Robertson, 2015; Thrupp, 2014, 2017; Wenworth, 2015; Wylie, 2012, 2016).

1.5.3.1 Initial Sector Reaction. Response to the introduction of the IES policy varied across the education sector. The secondary sector, as represented by the PPTA and Secondary Principals Association (SPANZ), generally supported the overarching aims, but representatives did not agree with the specific details of the initiative, so actively participated in a further consultation process to help shape the initiative (Barback, 2014). The PPTA officials stated that their motivation to do so was to ensure that any new career pathways being introduced “would be comparable and should not disrupt existing pathways ... due to careful integration” (PPTA, 2017a, p. 7) in particular with the SCT and other existing middle-leader roles. This last stipulation is a key aspect of research for this study - how the AST role either complemented or competed with existing roles and how those experiences impacted ASTs' professional identity development. Conversely, in the primary school sector, the IES initiative was initially wholly rejected and met with strong resistance from NZEI, with 93% of primary teachers and principals represented by New Zealand Principals' Federation (NZPF) voting “no confidence” in IES in the first year. Their concerns included funding allocations, staffing arrangements, a perceived lack of consultation as well as concerns of unsustainable career paths (Barback, 2014; Rawlins et al, 2015). Eventually, the NZEI and NZFP became part of the consultation process by joining the Working Group, accepting the amended IES policy.

1.5.3.2 Sector Consultation and the Establishment of the Working Group. The IES initiative when it was originally announced was described by the government as having been designed in consultation with sector partners (MOE, 2015). However, one of the major criticisms was a lack of genuine consultation with the sector during the design and implementation planning, instead involving them as an afterthought with the creation with the idea of a token Working Group (PPTA, 2017a; Rawlins et al., 2015). February 2014, a month after the January announcement, an IES Working Group consisting of sector leaders including representation from PPTA, NZEI, NZSTA, principal organisations and chaired by the Secretary of Education was established to provide feedback on the design of IES and its core elements (MOE, 2014). Apparently, the group had “robust debate, agreeing on some elements, not agreeing on others, and commissioning further work where needed” (MOE, 2014, p. 6). As detailed in the *IES Working Group Report, Part One* (2014) even though the teacher unions did agree to be part of the Working Group there was concerns, criticisms, and hesitation to be associated with the IES policy:

PPTA: The Association has given provisional support to the IES initiative. The broad aims of the initiative as stated in the cabinet paper are supported by the Association and reflected in its policy positions on increasing collaboration across schools, improving learning outcomes for students, and career pathways for teachers. However, much of the specific details in the Cabinet paper are not considered to be either workable in practice or acceptable to the sector and conflict significantly with Association policy on collaborative teaching practice, provision of appropriate professional learning and development, and fair and effective salary structures. (MOE, 2014, p. 27)

NZEI: While we have made a commitment to engage with the IES process in an effort to shape something beneficial to the education sector, it should be noted that we still have questions about whether the overall concept framing the IES initiative is the best

approach to achieving its stated objectives...There are four fundamental issues with the evidence presented in the paper upon which the IES initiative is based: 1. The evidence has little or no logical connection to the IES initiative. 2. The international evidence has not been interrogated and analysed to allow for its application in the New Zealand education context, and 3. The evidence cited is not robust and, in many cases, is inappropriate. 4. There is a lack of any consideration or identification or strategy to mitigate the potential risks associated with the initiative in the New Zealand context. We believe that further research is critical to the effective development and implementation of any initiative to raise student success. (MOE, 2014, pp. 28–29)

The criticism of the lack of consultation was publicly acknowledged on May 5, 2014, 5 months after the cabinet announcement. The *Education Gazette* published an article called “Investing in Education Success: A Bold Step for All Learners”. The article included a “myth busting” section. In response to the “myth” that the IES initiative had been developed without consultation with the sector the article stated, “while the initial policy parameters were developed by government, the nuts-and-bolts design has been the focus of the Working Group and will continue to be an entirely collaborative effort that seeks feedback from the sector at every juncture” (n.p.).

1.5.3.3 Scepticism of Government IES Motivation. Educationalists and academics expressed general scepticism about the premise that the IES initiative was formed mostly in response to New Zealand’s decline in the Organisation for Economic Co-operation and Development (OCED) Programme for International Student Assessment (PISA) rankings. Arguments were made that too much relevance was placed on only one academic measurement and a more robust investigation into learner achievement was required (Rawlins et al., 2015; Thrupp, 2014, 2017). Moreover, citing that the IES policy was heavily influenced by the Finnish education system who at the time were the highest scoring nation as well as having the

narrowest achievement gap. Furthermore, according to Hargreaves et al. (2007), trust, cooperation, and responsibility are at the heart of Finnish teachers' culture which arguably are values that have been tested in the New Zealand education sector since the Tomorrow's Schools competitive culture reform emerged. In addition, and related to this study, in Finland, "teacher-leadership is not a plan, a career structure, or a set of tasks but a defining feature of how the entire national system operates...teachers are able and expected to lead because there are things of substance worth leading" (Hargreaves (2002) as cited in Crowther et al., 2002, p. xi). Moreover, there was also criticism that Andreas Schleicher, the OCED director for education and skills, promoted the IES policy and proposed spending on the minister of education's National Party political website during an election year (Thrupp, 2017). Dibben and Youngs (2022) argued that Schleicher's action "illustrated a direct influence from a non-elected perceived neutral source on education policy" (p. 13). Concerns were also expressed by school leaders that the Kāhui Ako resourcing would be linked to the National Standards ³ data results (Barback, 2014; ERO, 2017, 2019; Rawlins et al., 2015; Thrupp, 2014, 2017).

A further area of contention related to the premise of performance pay. One of the government's significant stated motivations behind the Kāhui Ako initiative was the opportunity to generate and develop leadership positions as an alternative career pathway for teachers and school leaders. However, this was interpreted as deliberately funding those who were perceived to be experts in their craft and specifically rewarding those who were high performers. Previous National governments had tried to initiate a performance-based pay system; however, unions had refused to agree (Latham, 2012). The performance pay intention was seen to be reinforced by the Minister of Education, Hekia Parata in a speech at a SPANZ

³ National standards were a government imposed standardised way of reporting student achievement in primary schools from 2010 – 2017 and was very unpopular with teacher unions (Moir, 2017).

meeting where she stated in her opinion performance pay for teachers was about “sorting the wheat from the chaff” and she had not seen a lot of that “sorting going on” and teachers would be motivated to do high-quality work if they knew they were eligible to receive pay for their efforts and experience (Latham, 2012). Annesley (1993) stated that teacher performance-related pay (PRP) can take several forms but is essentially “a system of remuneration based fully or partially on the assessment and measurement of an employee’s productivity, performance, or skills” (p, 136). She cautioned against the use of PRP in the New Zealand education system due to three central problems: “the requirement for substantial and ongoing funding, the inability to define and measure teacher effectiveness and the lack of evidence establishing a link between PRP and improved teacher or student performance” (p. 147).

1.5.3.4 Sector Motivation to Embrace IES Initiative. The IES resourcing provided potentially thousands of dollars in salary and time allocation incentives for school leaders and boards of trustees as well as access to professional learning development (PLD) expertise. Therefore, if school leaders and boards didn’t opt into the initiative, they potentially excluded their teachers and community from considerable resourcing benefits. According to a survey by the NZPF in June 2016, some principals’ main motivation to join a Kāhui Ako was their fear of missing out on access to resources and funding if they did not comply (Wylie, 2016). Educationalists and researchers voiced their concerns that, even though becoming a member of a Kāhui Ako was voluntary, school leaders were incentivised through resourcing and could perceive the initiative as a way to fund their own school but then only partake in token shared activities (Wylie, 2016; Thrupp, 2014, 2017). Opinions expressed by academic commentators highlighted the perceived danger that school leaders would view collaboration as an opportunity to innovate for innovation’s sake or a way to market their own schools (Bendikson et al., 2015; Charteris & Smardon, 2018; Wylie, 2016). Wylie (2016) also criticised the Kāhui Ako resourcing priorities. She claimed that the planned resourcing didn’t allow time for the

data analysis required to support effective decision making by leaders nor would it facilitate the depth of data sharing throughout the network required for meaningful engagement.

1.5.3.5 The Genesis of the AST Role as an Alternative Career Pathway. In the first interactions of the IES policy discussed by the Working Group, different job titles and a significantly higher remuneration than what was eventually settled were proposed by the government. The original proposed terminology presented by policy writers in 2014 included that of executive principal (Kāhui Ako leader), expert teacher (AST) and lead teacher (WST). The role most relevant to the study was that of the proposed expert teacher:

Expert Teacher: These will be highly capable teachers who have demonstrated excellence in their practice. They will work with Executive Principals, and they will be experts in areas relevant to achievement objectives. They will work with teachers, inside classrooms, including within other schools in their community, to help lift teaching practice and improve student achievement. Time will be allocated to Expert Teachers to work with the other schools in their community. (“Investing in Education Success,” 2014, n.p.)

The original expert teacher terminology was rejected at the time, mainly by respective teacher unions in the Working Group (MOE, 2014), and the role definition evolved to:

Across-schools-teacher: The purpose of the across-schools-teacher role is to support improvement in student achievement and well-being by strengthening teaching practice. The role allows teachers to share their skills and knowledge in new ways across their Community of Learning | Kāhui Ako. Teachers learn with and from their colleagues in cycles of inquiry and improvement. (MOE, 2023a, n.p.)

Teacher union officials lobbied for not only a change in the name, and debatably therefore the expertise intent of the role, but also for lower remuneration. This was due to their concerns that the IES new roles exacerbated the existing leadership hierarchies and instead advocated for the

less remuneration to be replaced with a time allocation for individuals to carry out the roles effectively (MOE, 2014). A \$16,000 / annum allowance and equivalent of 2 days a week realise time was settled on (MOE, 2014; Thrupp, 2014). Despite the remuneration being less than originally proposed, and the release time structure modified, the level of resourcing was still significant compared with other existing middle and senior leadership positions. As highlighted in academic, union and government department publications this disparity caused widespread tensions (ERO, 2017, 2019; PPTA, 2017a, 2017b; Rawlins et al., 2015).

The AST role holds a unique position in the New Zealand education workforce and differs from traditional institutional leadership requiring well-developed relationship-management skills and the ability to navigate a range of complexities due to the varying priorities of leaders (ERO, 2017, 2019). Those appointed to the AST role are also required to understand, articulate and embody the moral purpose driving the Kāhui Ako (Wylie, 2016a). Furthermore, they require the ability to inspire others to ensure the structures and processes of shared decision making and learning develop through collaboration leading to a “shared sense of responsibility and ability to contribute through which a network can flourish” (Wylie, 2016, p. 18). Bendikson (2015) and the Education Review Office (ERO) (2017) stated that the attitudes, knowledge, and skill sets required for the Kāhui Ako roles would impact on the outcomes and the success of Kāhui Ako due to “their effectiveness in leading collective change and driving improvement will underpin the success of Kāhui Ako” (ERO, 2017, p. 17). Educationalists and academics involved in previous alternative career initiatives have suggested it is important to take time to build an understanding of the attributes and capabilities required of teacher-leaders selected for the Kāhui Ako roles (Durie, 2015; PPTA, 2017b; Wylie, 2016). Bendikson (2015) and Patterson (2014) specified three things need to happen before establishing the Kāhui Ako roles. Firstly, it is paramount to first build trust and relationships across the Kāhui Ako. Secondly, a common understanding of the attributes and

skills required in the roles needs to be collectively agreed. Lastly, allow time for those leaders within the community to naturally emerge. These findings were explored in this study.

1.5.3.6 Lack of Alignment and Impact of Kāhui Ako Roles Frustration was expressed in the education sector at the lack of government understanding of what the impact of the new roles would have on the existing professional landscape within a Kāhui Ako (PPTA, 2017a, 2017b; Rawlins et al., 2015). One of those frustrations related to the lack of alignment between the already established teacher-leader career opportunities for both secondary and primary teachers including the SCT and ACET roles.

The PPTA Collective Agreement at the time of this study and MOE Appointment Guidelines stipulated that an SCT could not be appointed as a WST or an AST (MOE, 2016b). The stipulation itself is understandable and ensures that any one individual does not have too many responsibilities. However, there have been recorded tensions, especially between role ambiguity and crossover of the SCT and the Kāhui Ako roles (PPTA, 2017a, 2017b). There were also restrictions placed on primary ACET teachers. If a teacher is awarded an ACET accreditation and then is employed:

- as a resource teacher for learning behaviours (RTLb), they no longer meet the eligibility criteria for ACET allowance.
- as a Kāhui Ako AST, they will need to relinquish the ACET recognition as they will not meet the ACET eligibility criteria of 0.8 FTTE classroom teaching; and
- an ACET teacher can only suspend the ACET allowance for up to 12 months and AST positions are for a fixed term of 2 years (NZEI, 2019).

These additions into the respective collective PPTA and NZEI agreements highlight the importance for policy alignment with existing roles rather than creating the potential of competing positions. Additionally, an argument can be made that an ACET-qualified teacher would seem to be the ideal candidate for the Kāhui Ako AST role and yet a candidate would

need to decide to maintain their ACET status or pursue an AST opportunity. Thus, role tension, disincentives, and barriers for potential candidates during the establishment of the Kāhui Ako initiative.

The fixed-term and resource-dependent nature of the Kāhui Ako roles arguably contradicted the career pathway intent of the IES initiative and created role and financial insecurity. After the maximum of 4 years, an AST position must be re-advertised in a contestable process (MOE, 2016a). If the incumbent AST are not re-appointed, they must return to their substantive role and therefore back to the “traditional” career pathway. The fixed term, and temporary, nature of Kāhui Ako roles could make it difficult to recruit the right calibre of teachers with the knowledge and skills to make sustainable change. Furthermore, when a key individual leaves a role, or a role ends, prior to the initiative and culture being sufficiently developed and internalised, the change may not survive the departure of the key individual (Fullan, 2010). Adding to this lack of role alignment and insecurity in 2017, 2 years after the initiative was implemented, there was evidence that the Kāhui Ako roles remained largely “a mystery to the teaching staff and were seen to be doing very little especially, where appointment processes were poorly managed and opaque” (PPTA, 2017b, p. 10). In summary an area of focus for this study was to understand how the participants navigated uncertainty, how they coped with the pressure of performing a new well-resourced role that was not well understood by the sector and how those experiences shaped their professional identity.

1.5.3.7 Kāhui Ako Recruitment Concerns. Historically, in New Zealand, research and evaluations have reported existing middle-leader roles are demanding and therefore difficult to recruit into. A survey of 4,098 secondary teachers conducted in 2016 (from a sample size of 13,394 PPTA members, 31% response rate) revealed that the initial attraction to middle-leadership curriculum roles was largely due to the ability to have increased influence over the curriculum. However, instead middle-leaders found themselves spending time on matters that

were only indirectly related to the curriculum including performance appraisal, digital developments, and quality assurance for the National Certificate of Education Achievement (NCEA). Pastoral-care middle-leaders, i.e., deans, also reported excessive workload and inadequate remuneration in their roles (PPTA, 2017a). Of the classroom teacher participants surveyed, 40% expressed a lack of appeal to be appointed as a curriculum middle-leader. They stated excessive workload for the time available, and inadequate remuneration levels that they believed failed to recognise the workload and levels of responsibility as reasons for their hesitation (PPTA, 2017a). These findings could either help or hinder new teacher-leadership initiatives such as Kāhui Ako. Prospective teacher-leaders who were looking for a change of career focus could have been sceptical that the new Kāhui Ako roles would be plagued with the same issues, conversely, the lack of appeal of other roles could attract them to the AST role. Nevertheless, the PPTA (2017b) stated there was evidence that the Kāhui Ako appointment processes had been poorly managed, and contributed to resentment and confusion amongst teachers, particularly middle-leaders, about the new positions “leading to an ‘us’ and ‘them’ view” (p. 10).

Kāhui Ako recruiting issues were also evident in the primary and intermediate sector. In a NZCER 2016 survey, a total of 771 primary and intermediate teachers at 228 schools (65% of the schools in the sample) completed surveys regarding their experience of the Kāhui Ako initiative. The respondents indicated whether they were interested in being appointed to one of the new Kāhui Ako roles. Two percent ($n = 13$) had already been appointed to a WST or AST role, with a further 6% interested in the WST role and 5% interested in the AST role. However, 37% of teachers were unsure, and 45% indicated they were not interested in these roles. Less than half (43%) of teachers agreed or strongly agreed there was career progression available in their school and a further 30% responded they were unsure (Bonne & Wylie, 2017, p. 42).

Adding to the complexity of recruitment for Kāhui Ako roles was a reluctance from a significant proportion of principals and boards of trustees (BOT) to share their most experienced and effective teachers with other schools, which is indicative of the long-standing history of competition between schools in New Zealand (Wylie, 2016). Consequently, there could have been a strong possibility of “gatekeeping” and denying the most suitable candidates the opportunity to apply for the Kāhui Ako roles (PPTA, 2017b). Alternatively, where principals and BOTs did embrace their Kāhui Ako positively further opportunities, beyond the immediate Kāhui Ako roles, were created for teachers, middle and senior leaders due to those vacating their existing employment positions to undergo the work of the Kāhui Ako. Consequently, colleagues were entitled to be paid a higher duties allowance and given release time to take on the role temporarily (MOE, 2016b). For example, a Kāhui Ako lead principal is released 2 days a week to perform their Kāhui Ako duties, therefore a deputy principal (DP) steps up to be the principal 2 days per week and subsequently a sequence of leaders and teachers are needed to backfill the vacated roles the Kāhui Ako appointment created. Conversely, finding that backfill was reported to be problematic due to a lack of teacher expertise within some Kāhui Ako especially in a national teacher shortage (Collins, 2019; PPTA, 2018).

1.5.3.8 Impact of Teacher Shortage on Kāhui Ako Operation. A combination of student growth and teacher shortage has reportedly had a significant impact on BOT and principals wanting to, and being able to, release experienced and effective teachers for the AST and WST roles (ERO, 2019; PPTA, 2017a, 2017b). A NZEI survey in 2018, during the formative years of Kāhui Ako, found that 30% of primary school principals reported there were no suitable applicants for the positions they needed to fill. More than half of the respondents (52%) reported that they did not have all the teachers they needed, and 28% had to increase class sizes because they could not find enough teachers. Ninety percent of principals explained they struggled to find relievers when teachers were sick (Collins, 2019). Similar findings were

reported by the PPTA, also in 2018 stating: “most of the measures in the report were the worst recorded by PPTA since the start of the series of reports in 1998” (p. 3). Most importantly, “principals are, in general, more pessimistic about recruiting and retaining teachers than they have ever been” (p. 3). There were “more jobs advertised and the mean number of applicants per position which were declining,” and “the relief pool continued to decline, with 8% of schools indicating they had no relievers ... the average number of relievers was the lowest ever recorded” (p. 3). Analysis by the MOE in 2018 revealed 650 extra primary teachers and 200 extra secondary teachers were needed in 2019 to meet the rising level of demand, driven mainly by the forecast growth in the number of students in schools (MOE, 2018b). Between 2010 and 2016, those enrolled in initial teacher education (ITE) dropped by 5,690, from 14,585 to just 8,895. During this period, New Zealand’s population grew by around 400,000. Those completing ITE qualifications dropped from 5,010 to 3,665 (MOE, 2018b). In summary the cumulative effect of historic mixed interest from teachers to transition into well established and /or new leadership positions coupled with the significance of a national teacher shortage may well have had an impact on the availability and calibre of teacher-leaders applying for the AST roles is an important context for this study.

1.5.4 Kāhui Ako Empirical Research and Reports

Some of the key empirical research and reports on Kāhui Ako that relate to this study are presented in this section. The common themes included the layers of complexity of the initiative; the importance of relational trust; the need for commitment and agreement on priorities and the necessity for systematic processes.

Researchers stated that historically New Zealand’s self-managing schools system had failed to improve achievement and instead had widened the disparity of student achievement particularly for Māori and Pacific nations ākonga (Dibben & Youngs, 2022). The introduction of policies such as Kāhui Ako that are “based on the assumption that collective responsibility

for equity and excellence is more effective when professionals see the educational landscape as an interconnected system with the potential of leveraging expertise beyond the confines of their own class or school (p. 18)” does have merit. However, meaningful policy implementation can be challenging and requires ongoing attention. Key success factors included high levels of alignment and coherence of organisational processes and patterns of interaction including relationship building focusing on trust; system-wide coherence; knowledge exchange and collaborative work (Constantinides & Eleftheriadou, 2023). School leaders’ have also commented on their concerns related to the pace of the change required to implement the Kāhui Ako policy, inadequate time to consider the implications, the inappropriateness of specific terms and uncertainty of the policy’s direction. Ultimately, they are “often wedged between staff, communities, and education administrative authorities, and expected to enact the complexity of policy” (Charteris & Smardon, 2018, p.30).

Bennett’s (2022) study provided a snapshot of the implementation of teacher coaching in a Kāhui Ako. The findings indicated that even though all the principals agreed to teacher coaching in their schools, in reality there was a wide variety of commitment levels and implementation approaches. The findings that are most relevant to this study related to the importance of principal support and participation in the initiative. Where the programme was seen “as an ‘add on’ that was layered on top of other school-wide initiatives coaching fell by the wayside, and the investment of time and resource provided by the MOE had not yet translated into any tangible outcomes” (p. 298). A further challenge related to issues caused by transient staff given the teacher coaching was implemented was significantly influenced by key personnel including the senior-leadership team and the trained coaches. Consequently, there was a risk that any of the established programmes could cease to exist if one of the driving personnel left their employment at the school (Bennett, 2022). Similarly, all the schools had experienced trained coaches moving on to roles in other schools, or coachees in established

partnerships leaving their position for another opportunity. One observation from the researcher was that initiatives are unlikely to survive or thrive if they are reliant upon one leader or funding source, resilient programmes that can accommodate continuous transition of educationalists is necessary (Bennett, 2022).

According to Aim (2019) many Kāhui Ako had identified improving culturally responsive practice (CRP) as a core objective reflected in chosen achievement challenges, which in turn resulted in ASTs specifically assigned to support change. Effective CRP in a New Zealand context would mean an education system:

Where power is shared between self-determining individuals within non-dominating relations of interdependence; where culture counts; learning is interactive, dialogic and spirals; participants are connected and committed to one another through the establishment of a common vision for what constitutes excellence in educational outcomes. (Bishop, Berryman, Cavanagh, & Teddy, 2007, p 15)

Highfield and Webber (2021) explored Māori student engagement and CRP practices in one Kāhui Ako that had a significant population of Indigenous Māori students and was led by a Māori Deputy Principal. In collaboration with the researchers, ASTs in the Kāhui Ako developed collaborative inquiry questions to investigate the change in pedagogies that resulted in positive educational outcomes for Māori students. The findings suggested that when deliberate culturally relevant approaches were authentically embraced by teachers and leaders in a Kāhui Ako, through meaningful engagement of the wider community, they were able to deeply understand the ākonga, whānau and community they served in truly culturally responsive ways.

Sinnema et al.'s (2020) study used social network analysis to investigate the patterns of collaboration and advice-seeking within and across schools with 101 educators including

those in Kāhui Ako roles. The findings of the study indicated that while within school networks were established the between-school collaboration was low with the:

Knowledge and skills [remaining] siloed within individual schools, which runs counter to the overall policy and the development of the overall social infrastructure across the COL...overall results suggest four broad themes: Misalignment around policy, changing COL leadership role; strong within-school ties; and the role of social networks in evaluation and execution. (p.9)

The researchers suggested to increase the possibility of success and sustainable change when executing Kāhui Ako initiatives leaders would benefit from considering the importance of existing teacher networks prior to and during implementation. Additionally, the level of engagement needs to be intentionally sought by educators with their colleagues and it is not only the quantity but also the quality of that engagement. The Kahui Ako policy assumes that by increasing connectivity among and between educators will inevitably result in favourable outcomes however that is not always the case (Sinnema et al, 2021). Educators who actively seek advice from their colleagues “are more likely to report higher levels of improved professional practice...[reaping] the rewards of network participation [benefiting] from engaging their COL colleagues” (p.12).

1.5.4.1 The New Zealand Post Primary Teachers’ Association. The Post Primary Teachers’ Association (2017) report contained findings from a survey of PPTA members identified as being part of a Kāhui Ako (PPTA, 2017b). The survey asked participants a range of questions about the degree to which implementation of Kahui Ako met the agreed aims of the initiative. The report contained evidence of both effective Kāhui Ako practices and perceived dysfunctional practices. In general, the report revealed continued support for the aims of Kāhui Ako by PPTA members but that the implementation process was failing to

support the development of both horizontal and vertical collaboration and consultation (PPTA, 2017b, p. 1). The report concluded that there was a:

Concerning breakdown between policy development and its implementation in schools...tensions between the Kāhui Ako roles and middle-leadership, a lack of understanding of purpose, tensions between the Kāhui Ako roles and many teachers in classroom roles; lack of expectations of and functions of the Kāhui Ako and of the individual Kāhui Ako roles. (p.60)

Evidence showed a significant disparity in how well-prepared leaders felt to perform their new roles. Out of the 16 Kāhui Ako leaders who completed the survey, fewer than half agreed that the Kāhui Ako “had its desired leadership structure, that they had received good advice and induction or that they had an appropriate PLD [professional learning development] programme for the role” (PPTA, 2017b, p. 31). Similar responses were reported for the AST and WST roles, and they were least likely to agree that they had received “appropriate induction and advice or that they had an appropriate PLD programme for their role” (PPTA, 2017b, p. 35). These findings highlight the need to understand more about how participants experienced the AST role and how in turn that impacted their professional identity development.

1.5.4.2 Education Review Office. ERO (2019) completed a case study report featuring the experiences of three Kāhui Ako: Northcote, Ōtūmoetai and Waimate, outlining the strategies and approaches they used to create, build, and strengthen collaboration. In preparing the report, the ERO evaluators interviewed each of the Kāhui Ako leaders and spoke to a range of key stakeholders including but not exclusive to: iwi⁴ representatives, ASTs, learning mentors, WSTs, teachers, MOE lead advisors, learning support trial coordinators, early learning services representatives, representatives of agencies other than education, and expert

⁴ Iwi refers to an extended kinship group or tribe and often refers to a large group of indigenous people descended from a common ancestor and associated with a distinct territory.

partners (ERO, 2019, p. 5). Interviews focused on key areas: decision-making processes in setting up the Kāhui Ako; purpose and focus of the Kāhui Ako; description of collaborative processes; perceived value of the initiative; monitoring and evaluation; leadership and new roles (ERO, 2019).

All three Kāhui Ako described the AST role as a “lynchpin” and explained it was “important to make sure the right people with the right skills were appointed to act as a bridge between school leaders and classroom teachers” (ERO, 2019, p. 16). The evidence indicated that AST positions had taken time to be fully understood by colleagues in the Kāhui Ako, and it was necessary to negotiate ways of utilising the role as there had been a slow uptake and interest from applicants (ERO, 2019). AST participants viewed their roles as equally:

Challenging and rewarding, both professionally and personally. They had the opportunity to observe leadership in action, and step into leadership themselves while maintaining a focus on teaching and learning. Other teachers had begun to appreciate their contribution and added value to the school and community, which lessened initial resentment about additional remuneration. (ERO, 2019, p. 17)

It was also stated the AST role had allowed teachers to act as “practitioners of research inquiring into and working on issues likely to have the most influence on learning across the education pathway” (ERO, 2019, p. 17). The Ōtūmoetai Kāhui Ako leaders decided to proactively mitigate any problems associated with the AST role. In their context, the remuneration associated with the role upset the dynamics amongst staff and was viewed as “undermining the pedagogical leadership Deputy Principals had demonstrated over the years...[additionally] in some instances, those appointed to the AST roles struggled to lead the learning of adults across the Kāhui Ako” (ERO, 2019, p. 20). Therefore, in response, the Kāhui Ako stewardship group decided to appoint their DPs as *learning mentors* with a clear mandate to support and build the capacity and capability of ASTs. The report findings stated that the

ASTs valued the support of their DP learning mentor and believed this relationship was critical to building their effectiveness in their role due to in one participants opinion:

We have curriculum expertise, but we don't have much leadership expertise. The learning mentors are helping to bridge that gap, strengthening our overall growth as leaders...The learning mentor helps to strengthen the credibility of the ASTs; they have the ability to influence and have done that on many occasions. (ERO, 2019, p. 20)

ERO also stated the innovative use of the skills and expertise of the DPs as learning mentors allowed the Kāhui Ako to “value the ‘unsung heroes’ in the system who appeared to some to be displaced by the Kāhui Ako model” (ERO, 2019, p. 20). Exploring how new roles introduced through government reform compliment rather than compete, and indivertibly displace others, were important concepts for this study.

1.5.4.3 New Appointments National Panel. Between 2021–2022, the NANP published two reports related to the panel's observations of Kāhui Ako and survey findings (NANP, 2021, 2022). The first report, dated October 2021, included 10 trends that the panel members had observed in their roles (NANP, 2021). The second report, dated February 2022, presented the findings of an anonymous survey of AST and Kahui Ako leader participants who had been through the reappointment process after 2 years in the role. The study included 69 Kāhui Ako leaders and 144 ASTs. AST participants represented 85 of the 220 Kāhui Ako (NANP, 2022). The findings relevant to the AST role from both reports will be compared to the findings of this study in later chapters. Interestingly, neither NANP nor the MOE have published any form of evaluation about the NANP appointment process itself. The research design of this study was therefore intentional in capturing the AST participants' experience of the NANP appointment and reappointment processes and the extent to which that experience prepared them for their AST role and shaped their professional identity.

In summary the key empirical research and reports presented in this section were thought-provoking and provided pertinent findings that were taken into consideration when designing the conceptual frameworks as well as questions for participants in Phases 1 and 2 of this study.

1.5.5 Kāhui Ako Developments

Significant developments that have impacted the Kāhui Ako initiative since its inception included an underspend of the IES budget, a change of government from National to Labour in October 2017, the mandate to end the establishment of new Kāhui Ako, the implications of the Budget 2023 announcements and the introduction of the Kāhui Ako responsibility allowance.

A total of \$359 million was pledged to IES over the first four years, and \$155 million a year after that, when the scheme was announced in 2014. However, only \$26 million (7%) of that budget was spent in the first three years of the IES initiative. \$18 million was spent on Kāhui Ako, \$4.6 million on the teacher-led innovation fund, and close to \$3 million on support and resources for teachers. A staggering \$333 million was left unspent after three years and with only one financial year left (Dougan, 2017).

In February 2017 the then opposition party's labour minister of education at the time, Chris Hipkins, expressed that in his opinion the under-spend showed the education section were sceptical about Kāhui Ako:

It would be fair to say that [teachers] have been under-whelmed by the whole concept and as a result [the Ministry] can't give the money away...the lack of consultation with the sector when IES was designed was now showing...when you're going to pour \$360 million into schooling you need to know it's going to make a difference...whereas they've poured that money in, it's barely been touched, and that shows the whole concept was badly designed from the beginning. (Dougan, 2017)

By October 2017 New Zealand had a change of Government consequently on June 14, 2019, Minister Hipkins announced that all approved Kāhui Ako would continue to be funded but no further funding would be approved and that \$79.5 million of the underspend would be put towards the cost of settling teacher collective agreement disputes with the rationale that schools have had five years to decide whether or not to join a Kāhui Ako (MOE, 2019). Clarification was made that the 74.5% of state and state integrated schools in Kāhui Ako would continue to operate with the funding they were entitled (MOE, 2019). Policy at the time of writing this thesis stated that new education institution members could still join existing Kāhui Ako where a logical pathway for students could be shown (Education Counts, 2023). Dibben and Youngs (2022) stated the change was an example of the “fickle nature of policy and the competing agendas that exist in the system as educators endeavour to adopt and sustain effective school-to-school collaboration” (p. 15) Budget 2023 published by the treasury outlined the government’s intended spending for the fiscal year 2023 / 24 and was presented by the finance minister, Grant Robertson on May 18, 2023 (Government of New Zealand, 2023). The document stated that Kāhui Ako would continue being funded at their current level until the end of the 2023 calendar year and no further funding would be allocated to Kāhui Ako beyond 2023 (MOE, 2023d) this revelation sparked speculation about the future of Kāhui Ako roles.

The final and most recent development relates to the inclusion of the Kāhui Ako responsibility allowance. The respective 2023–2025 Teachers Collective Agreements from September 6, 2023 (primary schools and kura), and January 28, 2024 (area and secondary schools and kura), stated fixed-term Kāhui Ako WST role allocations could be substituted for Kāhui Ako responsibility allowances (MOE, 2023b). According to PPTA guidance, the reason for the changes to the collective agreements were intended to give schools an opportunity to address the following issues reported by Kāhui Ako members: not enough people to fill WST allocation; disengagement from teachers who were not in Kāhui Ako roles; not being able to

recognise work being completed by other teachers on behalf of the Kāhui Ako; some degree of negativity towards Kāhui Ako role holders; concerns about relativeness with middle and senior leadership roles (PPTA, 2023a). The significance and inclusion of these developments once again stresses the complex, unpredictable and uncertain nature of teacher-leader roles that are created through government initiatives.

1.6 Introduction Summary

The purpose of the introduction chapter was to present the motivation, purpose, and context for this study. The narrative included setting the scene of the IES Kāhui Ako initiative, and more specifically the AST role, inception and development. Relevant publications from academics, researchers, unions, government organisations and educational commentators demonstrated the complex and controversial nature of Kāhui Ako. By examining the experiences of ASTs, this study investigated the ways in which those in teacher-leader roles considered themselves to be operating and developing their professional identity at the intersections and tensions between the intention of a government initiative and the reality of implementation. Some of those tensions and realities presented so far included:

- A fluid political landscape dependent on the elected government and representatives.
- The educational climate, including such aspects as the historic middle-leadership lack of professional support and a heightened national teacher shortage crisis.
- The vocal and published reservations and criticisms of the Kāhui Ako initiative, especially by colleagues through teacher unions and principal organisations.
- The constraints and lack of alignment of Kāhui Ako collective employment agreements with existing qualifications e.g. ACET allowance or other roles e.g. SCT.
- The need for participants to navigate a new national appointment process.
- The impact of new roles into the existing socio-ecological educational landscape.

Researching through this study provided valuable insights into a multi-million-dollar government-driven teacher-leadership initiative and the diverse range of factors and circumstances that need to be considered for the initiative to be successful for all involved.

1.7 Thesis Format and Outline

This doctoral thesis comprises seven chapters. Chapter 1 provides an overview of the study including researcher motivation, positionality, and the significance of the study, and presents the research question. This chapter also briefly introduces the New Zealand educational context, in particular middle-leaders and teacher-leader opportunities. Finally, an explanation of the IES initiative and its development is presented focusing on Kāhui Ako and the AST role.

Chapter 2 provides a literature review of the empirical evidence related to middle and teacher leadership including introducing the concept of hybrid-teacher-leaders. The concept of professional identity development for teacher-leaders is discussed. The chapter concludes with a first iteration of the teacher-leadership and professional identity development conceptual frameworks for this study based on the empirical studies presented.

Chapter 3 describes the overarching research design and rationale for both Phase 1 and Phase 2, including the methods to collect and analyse data, concluding with the key ethical considerations related to the research design.

Chapter 4 presents the findings of Phase 1: Qualtrics electronic questionnaire in the order the questions were asked as shown in Appendix A.

Chapter 5 presents the findings of Phase 2: transcendental phenomenological interviews. Special attention has been taken so that the data explication⁵ and presentation of the data are true to the phenomenological methodology.

⁵ Phenomenologists prefer the term data explication to the term data analysis. This concept is explained in detail in section 3.5.2

Chapter 6 combines the findings from both Phase 1 and 2 and presents an adapted (second iteration) of the study's conceptual frameworks.

Chapter 7, the final chapter, presents a general discussion of the study's overall findings. A social ecological theory model is used to demonstrate the impact of the introduction of teacher-leader initiatives into an existing professional landscape. The contributions and recommendations of this study to the area of alternative career opportunities for teacher-leaders, due to government initiatives, are presented for consideration. The study's limitations and possible future research directions are presented. The chapter closes with some concluding thoughts related to the appetite for, and subsequential implementation of, government policies that enable teacher-leader career opportunities.

CHAPTER 2: Literature Review

This chapter provides a review of the scholarship and empirical evidence that informed this research project. One of the complexities of any new leadership role being introduced due to government policy is related to terminology, hence the empirical evidence and theoretical frameworks best suited to support the implementation of the new role successfully. This review considers how the AST role is defined in order to understand the significance of role positioning impacting professional identity development. To do this firstly, the idea of whether ASTs are better suited to be considered as middle leaders or teacher-leaders is discussed. The exploration of this notion is complicated due to the considerable overlap and ambiguity between distributed-leadership, middle-leadership, and teacher-leadership research. The chapter concludes by presenting the first iterations of the conceptual frameworks for this study.

2.1 Distributed-Leadership

The Kāhui Ako policy in principle could be described as a distributed-leadership model especially with the creation of the AST role. Policy changes, curriculum development and the increased accountability and responsibility required of schools and principals have resulted in work intensification. These needs have, in part, been addressed by distributing some of the leadership load (De Nobile, 2019; De Nobile & Ridden, 2014; De Nobile, 2021; Dinham, 2007; Harris et al., 2019). However, Gurr and Drysdale (2013) do caution that the focus on distributed-leadership:

May indeed be exacerbating problems as people who do not want to be leaders, nor have the skills, attitudes, or aptitudes to be leaders are being forced into roles that have leadership as an expectation...leadership needs to be seen as a special quality and that the current vogue for everyone as a leader is unhelpful. (p. 62)

One of the aims of this study is to understand the *special quality* required of successful ASTs investigated through the exploration of participants attitudes, including what motivated them to apply for the AST role as well as considering required skills and aptitudes.

2.2 Middle-Leadership

As a newly created position those that take on the AST role are likely to draw from, align with and interact with middle-leader roles within the Kāhui Ako where they are working as well as previous work experiences. Therefore, the next section will explore the concept of middle-leaders and middle-leadership, especially in a New Zealand context.

2.2.1 Middle-Leader Definition

The origin of the term middle-leader is explained well by Grootenboer et al (2015):

By middle-leader we mean those who have an acknowledged position of leadership in their educational institution but also have a significant teaching role. Colloquially, they can be seen as those who sit between the principal or the head and the teaching staff – in the middle! We have adopted the term middle-leader to try and capture this positioning, but also to highlight that these leaders practise their leading from ‘among’ their teaching colleagues. (p. 509)

However, there is a difference in opinion on the breadth of a middle-leader definition and therefore the group it encapsulates. For example, De Nobile (2021) define middle-leaders as “the group of people between senior leadership (such as principals and deputy principals) and teachers / non-teachers without formal positions as well as, in some contexts, junior or emergent leadership” (p. 5). Yet Gurr (2023) defines middle-leaders as “teachers who have an additional formal organisational responsibility” (p. 115). Also, according to Gurr and Drysdale (2013) “true middle-leaders are usually at least one promotion step away from even considering being a principal” (p.58). For this study the term middle-leader is used when referring to formal positions of additional responsibility generally related to a curriculum subject (e.g. head of

department), pastoral (e.g. dean) or year level (e.g. a syndicate leader) where they are mostly compensated by remuneration and / or release time.

2.2.1 Middle-Leadership Practice

Middle-leadership practice in schools has been researched and reported on internationally since the early 1990s with some smaller studies conducted in New Zealand. Middle-leadership is a term used by researchers when describing roles of special responsibility and is a recent change from the older, more well-known term “middle management” (Fitzgerald & Gunter, 2006). This change in terminology in the literature reflects the evolution of the roles from “mundane administrative duties to increasingly more strategic leadership activities” (De Nobile & Ridden, 2014, p. 23) becoming a “role or function that creates coherence, increased efficiency and enhanced performance” (Hargreaves & Shirley, 2020, p. 96).

The functionality of the middle-leader role itself is complex, intensive, and challenging (Dinham, 2007; Fitzgerald & Gunter, 2006; Hargreaves & Shirley, 2020). Contextual or situation variables also influence the success of middle-leaders. These variables can include “the role and expectation of senior-leadership; the organisation structure, systems and culture of the school; and the specific contextual variables of the roles, such as the learning area, subject discipline or section of the school” (Gurr & Drysdale, 2013, p.66).

Lipscombe et al. (2023) identified and analysed 35 empirical articles on middle-leadership from 2006 to 2020 across 14 countries to understand how middle-leaders are defined, the responsibilities they hold, the impact and professional development they are afforded, and to discover gaps in studies to support further research. The study concluded: 1) middle-leadership is complex and difficult to define; 2) middle-leader positions and responsibilities vary considerably and are best understood in context; 3) middle-leaders directly and indirectly impact teacher practice, team development, school reform and professional learning, although there is limited direct research into their impact; and 4) middle-leader

professional learning has not progressed to the point to adequately equip middle-leaders for the complexity of their positions (Lipscombe et al., 2023).

In the New Zealand schooling sector, recognised middle-leaders are a large and diverse group, due to the contextual differences, that tends to contribute to administrative, pastoral, and pedagogical leadership. One of the most significant aspects of progressing to middle-leadership roles for a teacher is that it is often the first time these teachers are assisting and influencing learning and change in adult colleagues in contrast to students. This requires them to be “able to problem solve in novel situations and to respond flexibly, efficiently and effectively” (Highfield, 2018, p. 2). The middle-leader roles are unique; they are not solely teachers, yet they are not part of the senior-leadership hierarchy (Bassett & Shaw, 2018). The people who hold these roles are, for most of the time, still classroom teachers and interact with students as part of their roles. Busher and Harris (1999) asserted that middle-leaders are the “interface between the whole school domain and that of the classroom” (p. 6). This interface can bring a positional tension for middle-leaders who are delivering the change policies often determined by the school hierarchy or senior management (Bassett & Shaw, 2018). Researchers have also argued that while middle-leaders acquire an affinity with the senior leadership team and their own teaching team, they often don’t have a professional group with whom they identify in the school, which can lead to a sense of isolation (Struyve et al., 2014). Researching potential isolation for those in the AST roles was also a key consideration in this study.

The duties and responsibilities of middle-leaders can be divided into five broad categories: management, administration, supervision, staff development, and leadership (De Nobile & Ridden, 2014). Traditionally these roles provide an opportunity for preparation for more senior positions; and can also often be the most senior role an individual teacher holds throughout their career (MOE, 2012). However, whether the middle-leader role is part of a career trajectory or a destination in its own right, individuals are entitled to professional

development support. Gurr and Drysdale (2013) have stated there needs to be more thought given to structured experience-based programmes that develop the personal qualities and skills of middle-leaders:

That enhance working with colleagues (such as coaching and leadership skills like active listening and providing feedback) to improve practice, actively structuring experiences that progressively develop leadership capacity (with the use of internships, mentoring and coaching) and access to high-quality formal professional learning programmes that will like those experiences and develop awareness of the wider knowledge about improving schools...there also needs to be high expectations and processes in place that encourage middle level leaders to accept responsibility for their own learning and development. (Gurr and Drysdale, 2013, p.68)

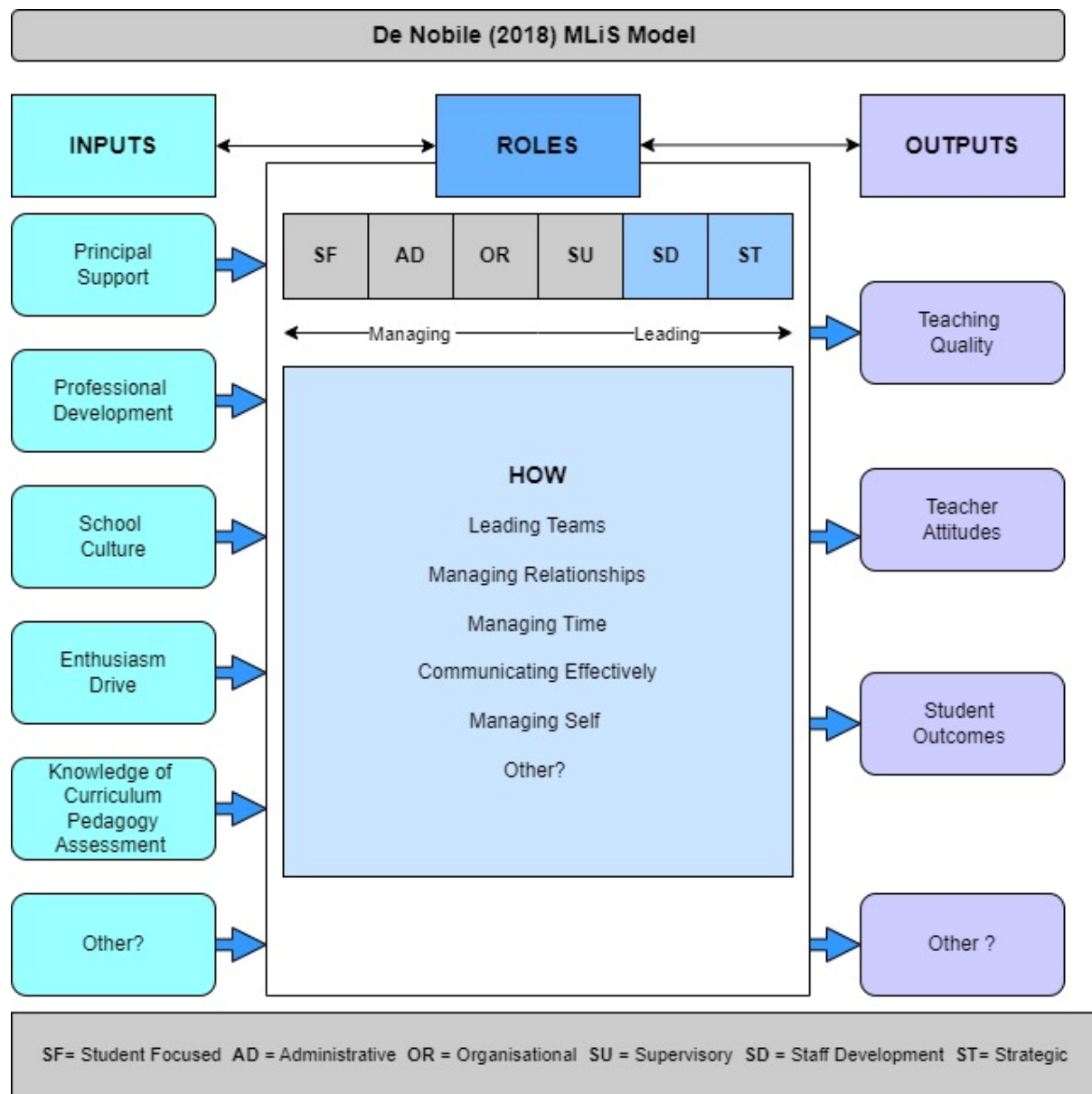
Unfortunately, the New Zealand education sector provides no expectations nor resourcing for the training, support, review or planning for the needs of professional support for those in middle-leader roles; “currently there is no national level information, tools or resources about middle-leader competence or professional training needs required to ensure a depth of leadership capacity and capability across the system” (Highfield, 2018, pp. 4–5). Additionally, ineffective appraisal systems were also highlighted in an empirical research study of middle-leaders in New Zealand secondary schools (Robson, 2012). Findings of that research revealed that middle-leaders perceived that they were not effectively supported through appraisal by senior-leaders and did not feel valued, developed, or empowered. Participants reported their engagement with their school appraisal system was compliance focused, and lacked any professional dialogue that they valued or felt added to their PD as a middle-leader. Robson (2012) argued the wider educational community needed to develop and implement appraisal policies and practices that were customised for middle-leaders that explicitly outlined areas of accountability, developmental aspects of performance, as well as ensuring ongoing

professional conversations were formalised. This historic inconsistent support of middle-leaders in New Zealand schools provides not only a context for this study but also the potential for similar experiences for participants appointed into the new Kāhui Ako AST role.

De Nobile (2018), as shown in Figure 2.1, created a model of middle-leadership in schools (MLiS) after an extensive review of middle-leadership literature as a “starting point for thinking about middle-leadership, a springboard for research” (p. 395). Even though the model is contextual and is not meant to be “orderly and linear” (p. 410), it was designed to show environmental and personal inputs into middle-leadership, the key roles middle-leaders play, and the potential outputs in relation to teachers’ and students’ effectiveness. It is important to note that teacher-leadership and teacher-leader were included as a search term in the review and “unfortunately leads to doubts about the veracity of the findings in terms of middle leaders” (Gurr, 2023, p.5). However, with that caveat taken into consideration the MLiS is a useful model to contemplate whether the AST role could be considered a middle-leader role or not. Areas marked “other?” on the model are “an allowance for the findings of the connected research” (p. 401). The aspects of the MLiS model that could be aligned with the AST role are coloured and those that could be considered out of scope are grayscale. The other concept for inputs could relate to the wider Kāhui Ako team, for example the lead principal and other ASTs support. The other concept for outputs could relate to iwi, hapū or whānau engagement.

Figure 2.1

De Nobile's (2018) MLiS Model Comparison to the AST Role



It could be argued the AST role as is designed by policy is more suited at the staff development and strategic leading end of the continuum. The staff development component involves building the capacity of staff members. “It may or may not stem from the supervisory role...the strategic role involves vision forming, goal setting and influencing” (De Nobile, 2018, p. 405). However, the “strategic role is likely to be much easier to carry out if middle-leaders are good staff developers, supervisors, administrators and organisers because they are creating the

optimal conditions for influence and change” (De Nobile, 2018, p. 405). Therefore, not having the other organisational and supervisory aspects to the AST role, compared to typical middle-leader roles begs the question whether it can be considered as a middle-leader role. In summary the AST role as defined by policy writers had the expectation to be influential on outputs such as teacher and student outcomes across multiple educational environments compared to traditional middle-leader roles. Conversely, as demonstrated using De Nobile’s MLiS model the AST role had no leadership positional authority and debatably were even more reliant on, and susceptible, to inputs such as principal support and school cultures. The next section will discuss the relevance of teacher-leaders and teacher-leadership to the study of the AST role.

2.3 Teacher-Leadership

Teacher-leadership has become one of the most studied leadership models, essential to both current school improvement policies and educational leadership and management over the last 20 years (Gümüş et al., 2022; Harris et al., 2019; Nguyen et al, 2020; Lieberman, 2014; Liu, 2021; Schott et al, 2020 Wenner & Campbell, 2017; York-Barr & Duke, 2004). Yet, even with the wide range of research studies there are varying descriptions of what constitutes teacher-leadership effectiveness mainly because like middle-leader, middle-leadership - teacher-leader and teacher-leadership are also inconsistently defined terms (Berg & Zoellick, 2019; Gurr & Nicholas, 2023; Natale et al., 2016; Neumerski, 2013; Sinnema et al, 2020, Smylie & Denny, 1990). Nguyen, Harris, and Ng’s (2020) review of 150 selected empirical articles spanning 2003 to 2017 found that there were 17 different definitions of teacher-leadership reflected. What is also important for the context of this study is that “the absence of a common vocabulary and common understanding undermines the potential of [teacher-leader] positions and the development of a coherent body of research that links roles, actions and outcomes” (Mangin & Stoelinga, 2008, p. 6). Wenner and Campbell (2017) also stated that “the lack of clarity surrounding teacher-leadership holds the potential to inhibit the field from building on others’

work” (p. 25). Berg and Zoellick (2019) concluded that this lack of a shared foundation of knowledge about teacher-leadership is a problem for education leaders in policy and practice “who are left to attempt to advance teacher-leadership by trial and error, instead of with the guidance of research” (p. 3). Therefore, with the understanding of this ambiguous research background, the intention of this section is to provide some clarity around definitions that could be considered as most appropriately aligned to the AST role as well as present the empirical evidence that shaped the creation of the first iteration of the teacher-leadership conceptual framework for this study as shown later in Figure 2.4 on pp. 64–65 which included in particular:

- York-Barr and Duke (2004), Wenner and Campbell (2017), Nguyen et al. (2020); and Schott et al. (2020) teacher-leadership literature reviews.
- Teacher-leadership studies in the UK by Muijs and Harris (2006) and the U.S. by Jacobs et al. (2016).
- Day and Harris (2002) and Berg and Zoellick (2019) teacher-leadership frameworks
- Teacher Leader Model (TLM) Standards as presented by Berg et al (2014)

2.3.1 Teacher-Leadership Definition

Neumerski (2013) stated teacher-leadership is “an umbrella term referring to a myriad of work” (p. 320). Crowther et al. (2009) expanded further by explaining teacher-leadership as “action that enhances teaching and learning in a school, that ties school and community together and that advances quality of life for a community...[defining] teacher-leadership as a transformative process that is grounded in definitive values and functions” (p. xvii). Furthermore, Holland et al. (2014) defined teacher-leadership as “the practices through which teachers – individually or collectively – influence colleagues, principals, policy makers, and other potential stakeholders to improve teaching and learning” (p. 700). These three definitions align most closely to the intent of Kāhui Ako policy.

2.3.2 Teacher Leader Definition

Most commonly, teacher-leader definitions have the same broadness as middle-leaders and therefore the group it encapsulates is also broad “comprising of the *formal* leadership roles that teachers undertake with both management and pedagogical responsibilities and include the *informal* leadership roles that include coaching, leading a new team and setting up action research groups” (Muijs & Harris, 2006, p. 962). More specifically Wenner and Campbell (2017) defined teacher-leaders as “teachers who maintain K–12 classroom-based teaching responsibilities, while also taking on leadership responsibilities outside of the classroom” (p. 140). Additionally, Curtis (2013) described teacher-leaders as “innovators, researchers, champions of student learning, leaders of colleagues and policy advocates” (p. 4). Bagley (2016) also suggested that the term should be “teacher-leader” with an intentional hyphen to provide a deliberate conceptual space for both “teacher” and “leader” identities as well as to demonstrate the need for a synergy between the two. The use and meaning of an intentional hyphen have been adopted for this study. A helpful definition in comparison to this study that also demonstrates the complex nature of defining ASTs is Gurr and Nicholas (2023) research on the impact of social networks on distributed leadership, explaining teacher-leaders are:

Those teachers with significant classroom responsibilities and no formal organisational position. They will be low to moderate on positional power because of the lack of a formal organisational position, but high to moderate on personal connectiveness. This definition covers those teachers who might be involved over a short-time period on an initiative that gives them some positional power, but most of their leadership influence will come from their personal connectiveness – their knowledge, skills, expertise, relationships, support, and trust (p.19).

Aspects of this definition and the importance of personal connectiveness are relevant to this study and the exploration of the AST participants’ experiences. However, the main

differentiation from this definition is the fact the AST role even though fixed term were introduced as a policy driven formal organisational role. The consequences of introducing a new leadership role as a formal position with no clear positional place or power is explored in this study, however, the point is the AST role was formalised.

Since 2013 over 200 researchers (including Berg and Zoellick) and practitioners of teacher-leadership have been gathering annually in person and online for a teacher-leadership congress as part of the American Educational Research Association (AERA). Their mission has been “to improve teaching and learning by providing an interdisciplinary and collaborative network to support high-quality research that informs the policy and practice of teacher-leadership and guides efforts to maximize the leadership influence of teachers in education” (p. 4). In 2016, at the AERA annual meeting in Washington DC, approximately 70 researchers and practitioners from across the US and internationally collaborated to create a teacher-leadership framework. These researchers used York-Barr and Duke’s (2004) teacher-leadership for student learning framework as well as Murphy’s (2005) pathways to teacher-leadership framework and J. E. Taylor’s (2008) dimensions of instructional coaching framework. The end result of this collaboration was a hypothesised framework that consisted of four key dimensions of teacher-leadership so researchers could clearly identify how teacher leadership could be defined in the context of their particular study (Berg & Zoellick, 2019).

To further explore whether the AST role could be defined as a teacher-leader role the Berg and Zoellick (2019) four dimensions of teacher-leadership framework as shown in Table 2.1 were utilised. Note the tick marks indicate the criteria that are relevant to the AST role as was intended by the government policy as part of the design phase (MOE, 2016b) and are not an indication that those criteria were necessarily successful. This analysis indicates that AST role could be considered a teacher-leader role, and therefore research on teacher leadership might usefully contribute to understanding some of the complexity of the AST role.

Table 2.1

Four Dimensions of Teacher Leadership (Berg & Zoellick, 2019, p. 8) Adapted for this Study.

Dimension	Example	Decision and provision
Legitimacy What is the basis for the teacher - leader's claim to legitimacy?	<i>Potential sources of legitimacy</i> <input checked="" type="checkbox"/> Assigned title, compensation, job description <input checked="" type="checkbox"/> Possession of specialised knowledge and skill <input checked="" type="checkbox"/> Recognition as an experienced, accomplished teacher <input checked="" type="checkbox"/> Personal and/or professional regard of colleagues/perceived influence <input type="checkbox"/> Situational, positional circumstances <input type="checkbox"/> Credential e.g., teacher-leader certification or degree	<i>Who decides?</i> <input type="checkbox"/> Self-determined <input type="checkbox"/> Recognised by colleagues <input checked="" type="checkbox"/> Selected/assigned authority by administrator
Support How are the teachers' leadership actions supported and by whom?	<i>Sample supports</i> <input checked="" type="checkbox"/> Time: compensated in money and/or release time <input type="checkbox"/> Professional culture <input type="checkbox"/> Differentiation of work tasks <input checked="" type="checkbox"/> Vision/guidance from principal to work toward shared goals <input type="checkbox"/> Leadership skill development <input checked="" type="checkbox"/> Principal as co-learner and co-leader with teacher-leaders <input checked="" type="checkbox"/> Connection to other teacher-leaders outside of school	<i>Who provides?</i> <input type="checkbox"/> Self-supporting <input checked="" type="checkbox"/> Network of teacher-leader colleagues <input checked="" type="checkbox"/> School or district administration <input checked="" type="checkbox"/> Higher education or nonprofit partner
Objective What are the objectives of the teacher leadership activities?	<i>Possible targets of change/improvement</i> <input type="checkbox"/> Instruction <input type="checkbox"/> School or professional culture <input type="checkbox"/> Organisational structures and decision making <input checked="" type="checkbox"/> Whole school reform <input checked="" type="checkbox"/> Policy <input type="checkbox"/> Resources to meet students' needs <input checked="" type="checkbox"/> Teacher satisfaction and retention <input checked="" type="checkbox"/> Professionalisation of teaching: higher regard for teachers as professionals	<i>Who decides?</i> <input checked="" type="checkbox"/> Self-determined <input type="checkbox"/> Collegial perception <input checked="" type="checkbox"/> Prescribed by role/programme designer or funder
Method What methods are deployed in pursuit of those objectives?	<i>Sample methods of influence</i> <input type="checkbox"/> Evaluating <input checked="" type="checkbox"/> Facilitating <input checked="" type="checkbox"/> Educating <input checked="" type="checkbox"/> Coaching <input type="checkbox"/> Advocating <input type="checkbox"/> Directing	<i>Who decides?</i> <input checked="" type="checkbox"/> Self-determined <input checked="" type="checkbox"/> Duties assigned by administrator <input type="checkbox"/> Collegial request

2.3.3 Teacher-Leadership Research Reviews

There have been four comprehensive reviews of teacher-leadership that were used to inform this covering the periods from 1980 to 2018 including: York-Barr and Duke (2004); Wenner and Campbell (2017); Nguyen et al. (2020); and Schott et al. (2020)

York-Barr and Duke (2004) were commissioned by the former Centre for Comprehensive School Reform and Improvement, operated, and funded by the U.S. Department of Education, to complete a comprehensive meta-analysis that investigated the concept and practice of teacher-leadership in the research literature. The intention of the review was to examine the definition of teacher-leadership, how teacher-leaders are prepared, their impact, and those factors that facilitate or inhibit teacher-leaders' work (York-Barr & Duke, 2004). Literature reviewed included numerous small-scale, qualitative studies completed between 1980 to 2003 that described dimensions of teacher-leadership practice, teacher-leader characteristics, and conditions that promote and challenge teacher-leadership. The final report emphasised that teachers use a variety of informal and formal channels to exert leadership and therefore traditional forms of management must be modified to be more horizontal and less hierarchical for teacher-leadership to genuinely flourish (York-Barr & Duke, 2004). The researchers then developed a conceptual framework for improving or expanding a teacher-leadership programme in schools. The framework comprised six major components with the intention of building a teacher-leadership pathway to achieve the outcome of high student achievement. The framework included statements regarding teacher-leader attributes, the leadership conditions they require, the targets of leadership influence needed and the mechanisms to do so which have been utilised for this study (York-Barr & Duke, 2004).

Another large-scale review of the literature on teacher-leadership conducted by Wenner and Campbell (2017) examined 54 pieces of research completed between 2004 and 2013. The most significant findings of this review included:

(a) teacher-leadership, although rarely defined, focused on roles beyond the classroom, supporting the professional learning of peers, influencing school-based policy/decision making, and ultimately targeting student learning; (b) the research is not always theoretically grounded; (c) principals, school structures, and norms are important in empowering or marginalizing teacher-leaders; and (d) very little teacher-leadership research examines issues of social justice and equity. (p. 134)

The researchers also noted that teacher-leaders should be leading the whole school and not promoting a particular program / curriculum this finding is an important distinction compared to middle-leader roles and an important consideration for the positioning of the AST role. They concluded their study by predicting:

The role of teacher-leader will continue to suffer from those factors that inhibit its effectiveness, and the struggles teacher-leaders encounter if researchers do not fill the gaps in the knowledge concerning teacher-leadership with rigorous, empirically based evidence. (p. 165)

The intent of this study was to contribute to lessening that knowledge gap.

Nguyen et al. (2020) conducted a review of 150 journal articles related to teacher-leadership that were written between 2003 and 2017. The review was “focused on identifying the contextual methodological patterns of teacher-leadership research, the evidence emerging from this empirical base, the main themes that emanate from the selected studies and the implications for future work in the field” (Nguyen et al, 2020, p. 62). As mentioned earlier, this literature review noted there were 17 different definitions of teacher-leadership, however, also stated there were four commonalities / hallmarks that were considered in the creation of the conceptual framework of this study:

Four common hallmarks of teacher leadership were identified in the review: teacher leadership is a process of influence; teacher leadership is exercised on the basis of

reciprocal collaboration and trust; teacher leadership operates within and beyond the classroom; and teacher leadership aims to improve instructional quality, school effectiveness and student learning. (Nguyen et al, 2020, p. 67)

Finally, Schott et al. (2020) conducted a review of 93 publications related to teacher-leadership literature that was completed between 2014 and 2018. One interesting recommendation from this review that was considered for this study related to the potential “dark sides” of teacher-leadership by proposing future studies explore:

The potential negative consequences of teacher-leadership. Potential negative effects for teachers themselves could include stress, role conflicts, burnout, and work-home interference. Additionally, negative effects for students, schools, and other actors are imaginable. Related to this, it would be interesting to analyze whether the relationship of teacher-leadership to various outcomes is linear. (Schott et al, 2020, p.12)

2.3.4 Other Teacher-Leadership Research

Other teacher-leadership research that informed this study included Day and Harris's (2002) four dimensions of teacher-leadership that could be considered relevant to the AST role including *brokering*, *participating*, *mediating* in professional *relationships*. The first dimension, brokering related to the ability of the teacher-leader to be able to translate the principles of the schooling improvement plan into the practice of classrooms. The other dimensions related to strategies to ensure teacher colleagues are able to participate authentically in that change by mediating and drawing on their own and others' expertise by forging meaningful professional relationships between all parties involved (Muijs & Harris, 2003).

Teacher-leadership dimension frameworks have also been developed to expand on the skill domains required for teacher-leaders. The Teacher-Leadership Exploratory Consortium was convened in the US in 2008 to develop professional standards that could stimulate dialogue

and advance thinking in the field of teacher-leadership. This coalition included representatives of national associations, state education offices, and higher education institutions as well as individual practitioners (Berg et al., 2014). Together they reviewed research and related literature, examined existing practices and programmes, and interviewed teacher-leaders and those with whom they worked with. The result of their collaboration was the publication of the Teacher Leader Model (TLM) Standards. The “standards” portion of the document maps the terrain of teacher-leadership performance as seven broad areas or domains: “(a) fostering a collaborative culture, (b) accessing and using research, (c) promoting professional learning, (d) facilitating instructional improvement, (e) promoting use of assessments and data, (f) improving outreach to families and community, and (g) advocating for students and the profession” (Berg et al., 2014, p.199). The consortium stated that the formal and informal leadership roles that teachers hold may require them to perform in one, several, or many of these domains but not necessarily all of them. Moreover, each domain includes a set of functions or sample actions that teacher-leaders might perform. These functions depict a range of leadership activities or behaviours that characterise a given domain (Berg et al., 2014). These dimensions, domains and functions have been expanded on and utilised in the teacher-leadership conceptual framework for this study.

The questions asked in the survey and interviews of Jacobs et al.'s (2016) study were also taken into consideration for this study. The purpose of their study was to determine the roles and activities teacher-leaders were engaged in, their perceptions of the attributes necessary for successful leadership, challenges they faced, support they needed, assistance they provided for addressing adversity, the benefits, and rewards of teacher-leadership. The study consisted of two phases: a survey of 177 teacher-leader participants across eight states, representing all regions of the US, followed by 20 teacher-leaders' in-depth interviews. The findings indicated that teacher-leader roles and the support they received varied greatly.

Knowing that teacher-leaders' development is impacted by the context in which they work, Muijs and Harris (2006) study of teacher-leadership in the UK explored the ways in which teacher-leadership can influence teacher development and how the school's ecology can help or hinder progress and useful research for informing this study due to the varied contextual nature of New Zealand schools. The researchers utilised a qualitative case study approach and purposely selected 10 schools as being sites where teacher-leadership was operational and encompassed a range of variables. Data was collected through semi-structured interviews from a cross-section of schooling staff including teacher-leaders, classroom teachers, middle-managers, governors, and head-teachers. This data was then combined with a collection of documentary evidence such as school development plans and reports from Office for Standards in Education, Children's Services and Skills (Ofsted) (Muijs & Harris, 2006). The findings indicated 10 common factors that enhanced the development of teacher-leadership and were seen to empower teachers and contribute to school improvement. These factors included: "a supportive school culture ... supportive structures ... strong leadership ... commitment to action enquiry and data richness ... innovative forms of PD... co-ordinated improvement efforts ... high levels of teacher involvement ... collective creativity ... shared professional practice ... recognition and reward" (Muijs & Harris, 2006, pp. 967–970). The study also found a wide variety of barriers to the development of teacher-leadership. These included external accountability mechanisms that put a strong burden on teachers and senior management and made the distribution of leadership more difficult and riskier; teachers' capacity to undertake extra work due to the lack of time to engage in activities outside of classroom teaching and administration; and lastly, the role of senior managers, especially in some cases were not willing to relinquish control and provide the autonomy teachers need to lead (Muijs & Harris, 2006). These findings were utilised in the conceptual framework for this study,

At this juncture, the literature review has indicated that the AST role could be best situated as a teacher-leader role rather than a middle-leader role. Another further distinction that was considered for this study due to the AST role being designed to primarily be grounded in the classroom was the concept of *hybrid teacher-leaders*.

2.3.5 Hybrid-Teacher-Leader

Hybrid-teacher-leader typically refers to an educator who takes on a dual role within their educational institution. These individuals combine traditional classroom teaching with leadership responsibilities, often involving mentoring, curriculum development, and PLD for other teachers (Margolis & Huggins, 2012). Hybrid-teacher-leaders (HTL) bridge the gap between classroom instruction and school leadership, acting as a link between teachers and administrators (Bagley, 2016).

Since the early 2000s the HTL has emerged as a prominent new niche for school leadership. This development is in large part due to a movement in the US of increasing responsibilities placed on principals to distribute leadership as well as a federally mandated push to connect leadership to student achievement with policies such as the 2002 No Child Left Behind Act (Bagley & Margolis, 2018). Potentially, HTL positions were designed to provide curricular and instructional coaches for teachers while still being grounded in their own classroom, compared to previous administrative and managerial teacher-leader positions, and, therefore “ultimately have a more direct impact on classroom practice systemically” (Bagley & Margolis, 2018, p. 34). Muijs and Harris (2006) have also suggested that leadership activities need to be built into a teacher’s work via a hybrid model rather than simply adding on to what teachers already do.

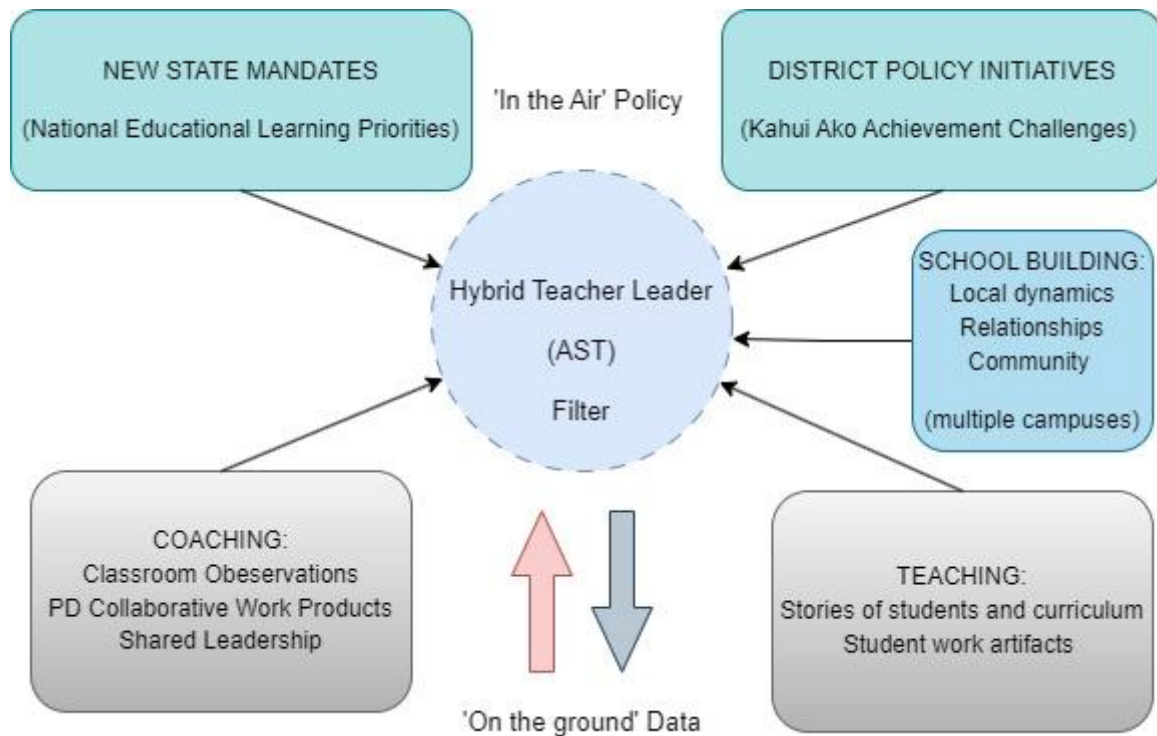
A significant piece of HTL research that aligns with this study was conducted by Margolis and Huggins (2012). The purpose of the project was to understand the impact of formalised HTL positions on the local professional landscape and school ecology within the

schools in which they were employed. Both ecological and social network analysis were utilised with the rationale that “they are complementary frameworks that further thinking about how school ecologies impact teacher relationships, and how in turn networks of teacher relations impact school ecologies” (p. 295). Weaver-Hightower's (2008) interconnected ecological theory was used as an analysis framework with the “actors” being the HTLs, in their dual role as a classroom teacher and coach, and their colleagues.

Figure 2.2 shows an adapted version of Margolis and Huggins (2012) framework in comparison to the AST role. The parentheses capture the in the new state mandates and district policy initiative boxes are an adaptation suggestion of the original model to this Kāhui Ako study. National Education and Learning Priorities (NELP) are set out by the New Zealand government's priorities for education. Achievement Challenges are identified and developed by a Kāhui Ako based on the shared needs of learners across the community (MOE, 2023). The HTL (AST) is shown to be at the ecological centre of initiatives acting as a “bridge” and “filtering” the *in-the-air policies* and the *on-the-ground data*. A second (red) arrow pointing up from the on the ground data has been added in this adapted version on the premise that ideally the on the ground data should also be informing the in the air policy and not just evaluating its effectiveness. The findings of Margolis and Huggins (2012) study and related HTL research will be discussed in Chapter 7 in comparison to the findings of this study. The definition and the intention of the HTL role does lend itself well to the AST role.

Figure 2.2

Margolis and Huggins's (2012) HTLs as the Ecological Centre of Initiatives for a second Transforming Instruction adapted for this study.



2.3.6 Teacherpreneurs.

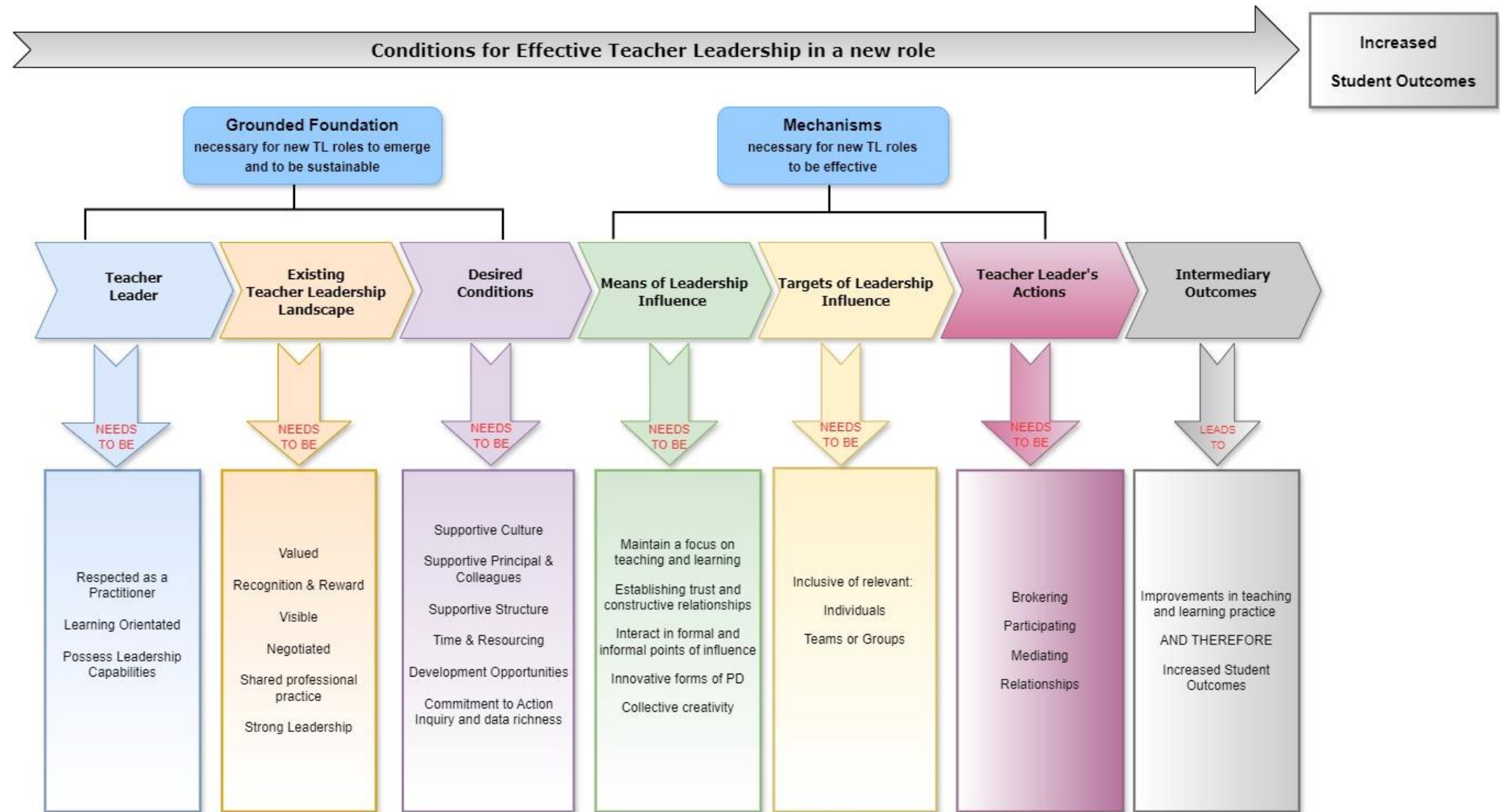
Another terminology that aligns to the HTL model is a term coined by Berry (2015) that he labelled “*teacherpreneurs*,” defined as “classroom experts who teach students regularly but also have time, space, and reward to spread their ideas and practices to colleagues as well as administrators, policy makers, parents, and community leaders” (p. 146). This term does differ from the terminology used for teachers who are digital entrepreneurs. Berry encouraged governments to think more industrially by making roles accessible through three high-leverage strategies for scaling up his theory of *teacherpreneurism* including: elevating and publicising the role of teachers, redesigning teacher evaluation and pay systems, and formally preparing and socialising new teachers as teacherpreneurs (Berry, 2015; Berry et al., 2013).

2.4 Teacher-Leadership Framework for this Study

The teacher-leadership conceptual framework (shown in Figure 2.4) is a synthesis of the relevant empirical research that has been presented and discussed and is a combination of both theories: of teacher-leadership as a process, as well as identifiable attributes required of teacher-leaders to be effective in their role. This framework was utilised when constructing questions for the Phase 1 online questionnaire and the Phase 2 interviews.

Figure 2.3

A Conceptual Framework for Teacher-Leadership (First Iteration)



The first three components in the **framework** describe the conditions that provide a **grounded foundation** necessary for teacher-leaders to emerge and the second three components show the **mechanisms** for teacher-leadership to be effective leading to the goal of increased student outcomes.

- A **teacher-leader** needs to be respected as a practitioner, have the desire to learn leadership skills, and have the capacity to develop those skills.
- The **existing teacher-leadership landscape** needs to be valued by colleagues, recognised, and rewarded, visible in the school, have strong leadership, continually negotiated through feedback and evaluation, and distributed among teachers through shared professional practice.
- The **desired conditions** need to include a commitment to action inquiry and data richness; have a supportive culture within the school that supports leadership of all levels; have supportive structures; colleagues who encourage leadership in others; the time, resources, and opportunities provided for teachers to develop leadership skills.

Therefore, when the teacher-leaders emerge from this strong grounded setting, they can then use the mechanisms of:

- **Influencing leadership** by maintaining a focus on teaching and learning, innovative forms of professional development, encourage collective creativity, establish trusting and constructive relationships by building influence in both formal and informal situations, and hone their skills through collaborating routinely with colleagues.
- **Targeting** individuals, teams and groups that influence and contribute to improved teaching and learning by utilising the following **teacher-leader actions** of:
 - **Brokering**: by managing how teachers translate the principles of school improvement into practice in their own classrooms to ensure that links within and across schools are secure and that opportunities for meaningful development among teachers are maximised.
 - **Participating** ensuring teachers feel part of, and own, change and improvement, fostering collaborative ways of working with colleagues to shape school improvement efforts and take some lead in guiding teachers towards a collective goal.
 - **Mediating**: as a source of expertise and information, the teacher-leader draws on additional expertise and external assistance.
 - **Relationships**: forging closeness with individual teachers, to underpin mutual learning.

Operationalising and utilising these mechanisms will lead to the **intermediary outcomes** that improve teaching and learning, which ultimately result in higher levels of student learning and achievement.

2.5 Teacher-Leader Professional Identity

How ASTs experienced their professional identity development in their new role was a key focus of this study therefore this section presents the relevant teacher-leader professional identity development empirical evidence that informed this study.

2.5.1 The Concept of Teacher-Leader Professional Identity.

Teacher-leader professional identity can be considered from the perspective of an individual process that:

Stands at the core of the teaching profession ... provides a framework for teachers to construct their own ideas of “how to be,” “how to act” and “how to understand” their work and their place in society. Importantly, teacher identity is not something that is fixed nor is it imposed; rather it is negotiated through experience and the sense that is made of that experience. (Sachs, 2005, p. 15)

Alternatively, identity might also be considered as a social process. Rodgers and Scott (2008) stated that when defining self and professional identity, it is important to note that identity is:

(a) formed by and within the social, cultural, historical, and political forces within multiple contexts; (b) shaped through relationships and involves emotions; (c) not fixed, but instead is shifting, dynamic and multiple; and (d) involves the construction and reconstruction of meaning through stories over time. (p. 733)

Teacher professional identity development is also a matter of both self-perception and legitimisation by others (Sutherland et al., 2010) and is a factor of the individual’s position within society, interactions with other people, and how the individual interprets those experiences (Gee, 2000). Unlike many other professions, teacher professional identity begins in childhood with a road map of experiences and interactions with one’s own parents, former teachers, and other adult role models that influences assumptions about the role of a teacher (Collay, 1998). Furthermore, teaching is not just an outcome of this life history:

It is itself a re-finding of the elements of our lives which we recognize as strands running through our everyday practice. As we make sense of the interactive process of life and teaching, we describe and articulate those common strands as values and beliefs. (Collay, 1998, p. 253)

Teachers continue to shape their professional identities through interactions with others in the workplace and these identities become fully developed and enacted within the organisational hierarchy in the ecology of the school. When teachers move into positional leadership roles, the process begins anew because, in addition to the “long-held beliefs about the teaching profession, teachers also have deeply-held beliefs about what leading is and who can do it” (Collay, 2006, p. 133).

Researchers have also argued that there is a social nature of identity formation, that the social worlds and relationships with which people engage help to shape and reshape identity (Akkerman & Meijer, 2011; Beauchamp & Thomas, 2009; Beijaard et al., 2000, 2004). As a social process, teacher-leader identity is likely to reflect the context in which leaders work. Beauchamp and Thomas (2009) stated that “situating the shaping of a teacher’s identity within the context of practice implies the necessity to be aware of the effects this context might have on the shifts and changes in a teacher’s identity” (p. 184). The work context for this study is that of Kāhui Ako.

The psychological aspect of how teacher identity develops has received limited scholarly attention and is left largely unexplored by the literature as the “black box of how teachers should go about making the psychological shift from being authored by these forces to authoring their own stories” (Rodgers & Scott, 2008, p. 733). Therefore, the purpose of this study is to add to the empirical research by exploring the lived experiences of “becoming” a AST teacher-leader, reflecting through their own perspective on a transitional state from a previous status into a space of “betwixt and between” in the liminal phase as part of a rite of passage (Turner, 1980). The liminal (transition) phase is the period between states, during

which one has left one place or state but has not yet entered or joined the next. During this stage, participants “stand at the threshold” between their previous way of structuring their identity and a new way, which is established by completing the transition to the new role (Turner, 1980). The essence of this study is to be able to authentically capture the transitional experience of ASTs and therefore inform the profession regarding how educators can support teacher-leaders transition successfully, particularly when part of a new government initiative.

2.5.2 Teacher-Leader Professional Identity Research

Seemiller and Priest (2015) conducted an extensive synthesis of professional identity literature to find the “hidden who” in educational leadership. They argued that a “great deal of literature exists for leadership educators related to program design, delivery, and student learning. However, little is known about leadership educators, who have largely been left out of contemporary leadership education research” (p. 132). Their synthesis included a proposed framework for better understanding the development of professional identity. The framework suggested that individuals move forward and backwards through identity spaces of exploration, experimentation, validation, and confirmation because of the impact of both ongoing influences and positive and negative critical incidents (Seemiller & Priest, 2015, 2017).

There is less empirical research focused on “how individual leadership development processes unfold and what critical experiences help to explain these desirable outcomes” (Poekert et al., 2016, p. 309). The exploration of the “how” of these critical experiences of the AST role is a key part of the investigation within this study.

A government initiative that is relevant to teacher-leader professional identity formation and transitions occurred in Israel in 2018. The Israeli MOE designed an initiative to develop teacher-leadership in a formal, nationwide strategy. The initiative aimed to cultivate a layer of leadership in schools, by teachers and for teachers, to change learning cultures. This layer of leadership provided appointed teachers with an opportunity to facilitate ongoing PD of their colleagues to enable improvement in teaching and learning practices (Russo-Netzer &

Shoshani, 2019). One empirical study of this Israeli initiative aimed to expand the scope of teacher-leader psychological research by:

Shedding more light on the internal mechanisms underlying the transition to, and formation of, the professional identity of teacher-leaders and the unique liminal phase or period of transition in which teachers identity as leading teachers had been shaped and the teachers moved to the threshold of new experiences and possibilities and also possible challenges. (Russo-Netzer & Shoshani, 2019, p. 372)

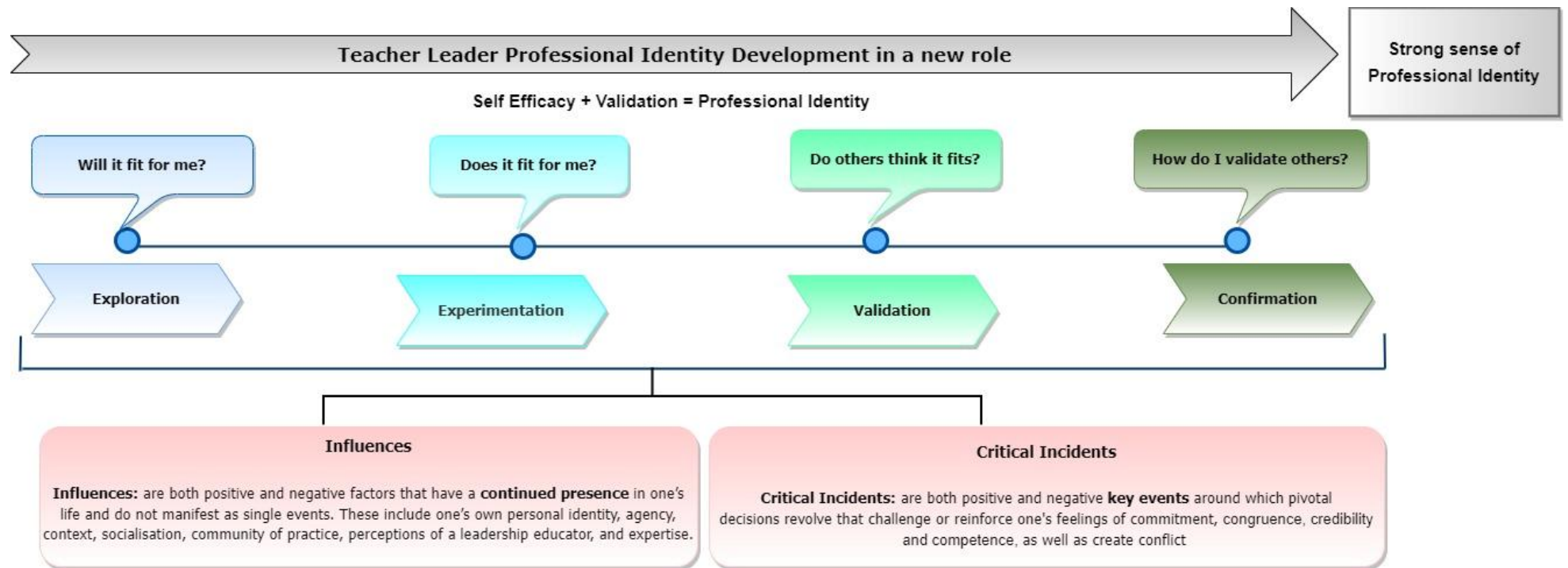
The study utilised a bottom-up, open-ended qualitative approach. Data was collected from 60 interviews with 41 teacher-leaders who were selected to participate in the new government initiative leadership training programme, 10 principals and 19 teacher-leaders' colleagues. The intention of the interviews was to explore the experiences of an initial transition phase, "where the participants strive to make sense of the new situation, negotiate shifting conceptions of teaching and leadership, and construct their new identity as teacher-leaders" (p. 373). The findings led to a conceptual model with three central components that were instrumental in forming an overall professional identity: being chosen, meaning making and the impact of external forces such as colleagues and their principal. Elements of this model have been utilised in the conceptual framework design of this study.

2.6 Teacher-Leader Professional Identity Framework for this Study

The conceptual framework shown in Figure 2.5 is a synthesis of the empirical research that has been presented and discussed in relation to teacher-leader professional identity. This framework was utilised when constructing questions for both Phases 1 and 2. *Professional identity* refers to the participants' overall comprehension of what it means to be a teacher and leader. This includes both self-perception of the teaching profession and socially constructed perceptions regarding the profession that were derived from their socialisation (Russo-Netzer & Shoshani, 2019).

Figure 2.4

A Conceptual Framework for Teacher-Leader Professional Identity for This Study



Adapted from Ibarra and Petriglieri (2010), Lave and Wenger (1991), Seemiller and Priest (2015, 2017), and Sutherland et al. (2010)

FOUR TRANSITIONAL PHASES

1. Exploration: defined as the space in which an individual explores if, and to what extent, they might take on the professional identity of leadership educator.

Questions the individual may consider in this space include:

- *What is this identity and what does it mean for me?*
- *Do my values, beliefs, and styles fit with my perception of this identity?*
- *Do my values, beliefs, and styles fit with others' expectations of this identity?*

2. Experimentation: the space in which one tries on parts, or all the leadership educator identity, creating multiple versions of oneself to determine what feels right. The leadership educator often imitates others who are more experienced in the field and then selects what they consider to be best practices that become part of their own identity. Questions the individual may consider in this space include:

- *How do different aspects of this identity fit with my values, beliefs, and styles?*
- *How do I feel in each version of my leadership educator identity?*
- *What will be core components of my leadership educator professional identity?*
- *To what extent do I want to delve deeper into developing this identity?*

3. Validation: self-validation and validation from others is critical.

Questions to consider in this space include:

- *Who validates my identity?*
- *What counts as validation?*
- *What are the criteria for having this identity?*
- *What do I need to do to demonstrate or prove this identity?*
- *When can I claim this identity?*

4. Confirmation: an individual has attained full membership within a leadership education community of practice.

Questions the individual may consider in this space include:

- *How will I know when I am confirmed?*
 - *What are the expectations of me as a confirmed member of this professional identity to enhance our profession's understanding of the leadership educator experience?*
-

In summary, the purpose of the literature review was to present and discuss some of the relevant theories and empirical research that were pertinent to the development of the two synthesised conceptual frameworks for this study related to distributed leadership, middle leadership, teacher-leaders, teacher-leadership, and professional identity development. The next chapter outlines the research design for this study.

CHAPTER 3: Research Design

This chapter provides a rationale and explanation for this study's research design including the study aim, research question, overall design, data collection and methods for analysis. Ethical considerations and issues related to validity, reliability and data storage are also discussed.

3.1 Study Aim

The aim of this study was to investigate teacher-leaders' experience as ASTs within the New Zealand Kāhui Ako government initiative and how this experience impacted their professional identity development. A mixed methods approach was used to gain a broad understanding of the potential tensions within the role while also providing an opportunity to gain an in-depth understanding of the lived experience of teacher-leadership as described by participants. This study was divided into two separate, but interrelated, phases, as outlined in the following sections.

3.2 Overall Research Design

This investigation followed an exploratory sequential mixed methods design, typified by Creswell (2014). This method involved gathering data to explore a phenomenon and collecting further data sets to explain relationships found in the original data set at a deeper level (Creswell, 2014). Phase 1 involved AST participants completing an electronic Qualtrics questionnaire. Upon the completion of Phase 1, participants were able to volunteer to take part in Phase 2, which involved a phenomenological interview. The deliberate decision to use a mixed methods approach allowed the integration of the most appropriate techniques from both quantitative and qualitative research designs to answer the research question. Moreover, the design intended to gain more valuable insight than could be gained through one approach used in isolation. The questionnaire was designed to elicit the views and experiences of a broad range of ASTs and the interviews allowed a depth of understanding about their lived experience (Creswell & Poth, 2016; Teddlie & Tashakkori, 2010). One identified challenge in this strategy

related to which results from Phase 1 to follow up on in Phase 2 (Creswell & Poth, 2016). The overall research design was linked largely to the motivation to authentically capture the voices of the participants' experience of being an AST and how that experience impacted their professional identity development.

Table 3.1

Research Design Summary

Research question	Data collection method	Participants	Analysis and explication method
How do Community of Learning Kāhui Ako across-schools-teachers' experience their professional identities as teacher-leaders within a government initiative?	Phase 1: Qualtrics electronic questionnaire	N=154	Descriptive analysis of quantitative variables. Thematic analysis of open-ended questions
	Phase 2: Transcendental phenomenological interviews	N=28	Phenomenological explication of the interview data

3.3 Ethical Considerations

Ethical issues are present in any kind of research. Ethics “refers to doing no harm, ensuring confidentiality and / or anonymity, managing risk and not distorting data” (Hill, 2008, p. 271). To mitigate and reduce the risk to participants, the following ethical principles were applied during this study:

- consideration of power issues.
- avoidance of deception.
- voluntary participation and the right to discontinue.
- gaining informed consent.
- privacy, confidentiality, and anonymity (where realistically feasible).
- no harm and reduce risk.
- ownership of data.

(Asselin, 2003; Brydon-Miller, 2008; Cohen et al., 2011; Creswell & Poth, 2016; Flick, 2014; Lindsay, 2010; Punch, 2000).

Ethics approval was granted by the University of Auckland Human Participants Ethics Committee to conduct this study on 30 January 2020, reference number 024139. Participant information sheets (PIS), a Kāhui Ako leader consent form and online digital consent were all used for the participants and can be found as Appendices A–E.

There can be considerable value in using contact networks including family, friends, fellow students, and work colleagues when considering participants. However, due to my positioning, as explained in Section 1.1 it was important to consider power and influence (Clark et al., 2021; Lindsay, 2010). I therefore sought participants from outside my immediate sphere of influence in my duties as a government official to mitigate any perceived conflict of interest or undue pressure on AST colleagues to participate.

The research process, in its essence, creates a tension between the aims of research to make generalisations for the good of others and the rights of participants to maintain privacy and confidentiality (Wiles et al., 2008). Due to the nature of the data collection, anonymity could not be guaranteed. Participants were notified through the PIS that due to the nature of the sample group I may be able to link data to individuals or groups, however, participants were assured that confidentiality would be maintained should this occur. In a research context, “confidentiality means (1) not discussing information provided by an individual with others; and (2) presenting findings in ways that ensure individuals cannot be identified, chiefly through anonymisation” (Wiles et al., 2008, p. 418). The names of the participants and the name of their employing Kāhui Ako were not published, and pseudonyms were used. Raw digital data from the completed surveys and transcribed data are kept on a password protected hard drive for confidentiality and security reasons.

3.4 Phase 1: Qualtrics Online Questionnaires

This section will discuss the rationale for choosing an online questionnaire method as a data collection tool. Wording of questions, response choices and data analysis were carefully considered as part of a complete and interrelated design (Fink, 2015). The success of this phase

was also dependent upon the participants' desire and willingness to share their experiences from their natural setting (Fink, 2015). Therefore, ensuring the design was as user friendly and accessible as possible was important, given the participants were at the time in a national COVID-19 pandemic lockdown.

3.4.1 Questionnaire Design

The rationale for choosing an online questionnaire method for Phase 1 was due to the ability to gather anonymous responses from a relatively large number of people from dispersed and remote locations across New Zealand (Rowley, 2014). Using online questionnaires to collect data is also efficient, low cost and affords the opportunity to obtain structured data without being directly involved (F. J. Fowler, 2013). The use of an online questionnaire allowed participants to choose to answer the questions in a venue and time-frame suitable to them. Potential participants had the right to decline to participate or answer any questions without the pressure that could occur if an interviewer was present (Fink, 2015). The questionnaire was also conducted during the COVID-19 pandemic lockdown restrictions, which was not anticipated in the initial design of the study; however previous decisions regarding data gathering were still appropriate and didn't have any negative health impacts on the researcher or participants.

The Qualtrics software was selected due to it being a widely used convenient online platform approved by the University of Auckland. The platform provided a user-friendly interface and a range of features to design, distribute, and analyse the online questionnaire, eliminating the need for a paper-based questionnaire. Furthermore, Qualtrics automatically collated data into an Excel spreadsheet, enabling an overview of results. One disadvantage of online questionnaires is that respondents may simply omit questions or leave the questionnaire incomplete (Acharyya & Bhattacharya, 2019), therefore, the compulsory question fields and submission reminder functionalities were activated.

In designing the questionnaire, a review of similar questionnaires was conducted including those developed by the PPTA, NZEI teacher unions and those that were

commissioned by the government including the MOE and NZCER. Some of the questions from other studies were utilised in the final questionnaire design, in particular alternative career pathway motivations for teacher-leaders from a study about SCTs (Ward, 2007).

The questionnaire included a combination of continuum scales with opposing descriptions at opposite ends of a numerical spectrum as well as open-ended questions based on both the teacher-leader and professional identity first iteration conceptual frameworks for this study as shown in Sections 2.4 and 2.6 (Bazeley & Jackson, 2019; Robinson & Lai, 2005; Rowley, 2014).

As part of the design it was anticipated that the participants would have different levels of knowledge and experience in their AST role and / or give different levels of consideration to the questions (Rowley, 2014). Equally significantly, participants would interpret questions from their worldview, including “their understandings, interpretations, values, views and attitudes” (Rowley, 2014, p. 328) regarding their interpretations of their experiences. The questionnaire should not only accommodate the research and the researcher, but also accommodate the respondents by using language that they are familiar with and understand (Rowley, 2014). Nonetheless, knowing that “questionnaires reflect the designer’s view of the world, no matter how objective a researcher tries to be...what we choose not to ask about may just as easily reflect our world view as what we include in the questionnaire” (Gray, 2021, p. 339), efforts were made to mitigate question interpretation variation and researcher bias in the design phase by piloting the questionnaire (Fink, 2015).

Questionnaire piloting tested the questions for variation, meaning, difficulty, and respondent interest and attention as well as testing the questionnaire for flow, question order, skip patterns, timing, respondent interest, and respondent wellbeing (Gray, 2021). The questionnaire for this study was trialled with a small group of education professionals ($n = 10$) not included in the sample group. The group included ASTs, Kāhui Ako leaders, supervisors, academic colleagues completing postgraduate study and colleagues at the MOE to test the

validity and understanding of the questions and how long it would take to complete. The questionnaire was then modified based on the feedback (see Appendix A).

The main areas for revision included the need to provide further explanation of the types of answers that were expected for some of the questions for example providing definitions of terminology and theoretical jargon as well as more opportunities for open-field text boxes to expand on any answers as required. This last modification is described as a common limitation of quantitative questionnaire research due to a reduced opportunity to explore the responses of participants in more detail (Fink, 2015). While the questionnaire mainly collected quantitative data more open-ended questions were also added to allow the participants to elaborate on their answer or to express their opinions and thoughts without a predetermined range of answers (F. J. Fowler, 2013) due to the rationale that questionnaires “should not be viewed as offering the answer, but rather as a valuable tool in understanding a situation” (Rowley, 2014, p. 328). The call for volunteers to participate in Phase 2 interviews also provided participants from Phase 1 the opportunity to expand further on their initial questionnaire answers in an interview context.

3.4.2 Questionnaire Data Analysis

The key components of the data analysis for Phase 1 included: organising the data set; getting acquainted with the data; classifying; coding; interpreting the data; presenting and writing up the data (Brinkmann & Kvale, 2015; Creswell & Poth, 2016). To support this analysis, three widely used software programmes approved by the University of Auckland were utilised: SPSS (Statistical Package for the Social Sciences), NVivo12 and Microsoft Excel. Each participant was assigned an identification code from SURP1 (survey participant 1) to SURP154 (survey participant 154).

SPSS was used for the analysis of quantitative questions in the questionnaire. SPSS is a software program for statistical analysis and data management. It provides a range of tools and procedures for data manipulation, descriptive statistics, inferential statistics, and data visualisation (Yockey, 2011). Furthermore, the *Spearman rank correlation* test was used.

Correlation is a measure of an association between variables, usually in the context of a linear relationship, in the same (positive correlation) or opposite (negative correlation) direction. While the Pearson correlation coefficient is used for normally distributed data, the Spearman rank correlation is suitable for non-normally distributed continuous data, ordinal data, or data with relevant outliers (Schober et al., 2018). For the open-ended questions and additional comments, qualitative data thematic frequentist inference analysis was completed (Clarke & Braun, 2013). Frequentist inference analysis draws conclusions by emphasising the frequency or proportion of the data. This process involved coding each transcript line or concept and grouping recurring concepts to identify emerging themes and patterns of meaning across the dataset (Clarke & Braun, 2013; Creswell, 2014; Robinson & Lai, 2005). Open-ended questions and additional-comment questionnaire data were exported from Qualtrics software and imported into the qualitative data analysis software NVivo12 and Microsoft Excel. NVivo12 software tool developed by QSR International is able to organise and analyse nonnumerical or unstructured data by classifying, sorting and arranging information; examine relationships in the data to test theories, identify trends and cross-examine information in a multitude of ways using its search engine and query functions (Bazeley & Jackson, 2019). Tolich and Davidson (2018) also recommended using the following questions when becoming familiar with and working with the texts within the data sets:

- What is interesting about this?
- How does this enable me to think further about or conceptualise the issues being addressed?
- Are these issues attended to in the literature and in what ways?
- Does my data seem to support or qualify my broad sense of the literature? (p. 248)

Central to the analysis of the qualitative data imported into NVivo 12 was the use of the coding process and therefore turning the raw data into a communicative and trustworthy “story” (Skjott Linneberg & Korsgaard, 2019). This process included identifying segments of meaning in the

data and labelling them with a code, which can be defined as “a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaña, 2021, p. 5).

The coding process created an inventory of accessible data, provided the ability to acquire comprehensive insights, ensured transparency and validity and, lastly, a driving intent of this study, gave a voice to the participants (Skjott Linneberg & Korsgaard, 2019). Thornberg and Charmaz (2014) stated that the coding process can be viewed as interactive due to creating a means to understand the phenomenon and / or participants and their perspectives. As a result, through the dynamic development of codes, the researcher can come to understand participants’ views and actions from their perspectives (Thornberg & Charmaz, 2014). A combination of inductive and deductive coding processes were used in a blended approach (Graebner et al., 2012). Starting inductively ensured a closeness and “loyalty” to the data using informant-centric terms; however, when followed with a more deductive approach, researcher-centric terms ensured structure, focus and theoretical relevance to that of teacher-leadership and professional identity development (Graebner et al., 2012; Skjott Linneberg & Korsgaard, 2019). Researchers are also susceptible to interpretation bias during the coding process therefore, it was crucial to reflect on assumptions and biases throughout the memoing process and be appropriately tentative in making assertions. Supervisors were also invited to check the classification and coding of the data (Graebner et al., 2012; Rowley, 2014).

The anchor code nodes that emerged through this process included: recruitment motivation and rationale for applying for the AST role; positive and negative influencing factors on the participants’ experience as an AST; critical incidents; opportunities and challenges of the AST role; and, lastly, desirable skills and characteristics required of an AST to be successful from the perspective of the participants. These themes were then backward mapped to the conceptual frameworks for this study as shown in Sections 2.4 and 2.6. Any themes that were

not represented in the original frameworks were then considered for the adapted and final conceptual frameworks as presented in Chapter 6.

3.5 Phase 2: Transcendental Phenomenological Interviews

Phase 2 data was gathered through interviews with participants who volunteered to participate through Phase 1. This section will discuss the rationale for choosing the transcendental phenomenological interview method as a data collection tool.

3.5.1 Interview Design

A transcendental phenomenological approach was chosen intentionally for this phase to gain an understanding of the lived experiences of teacher-leaders in a new government initiative, for three main reasons. Firstly, my positioning as an insider researcher as outlined in Chapter 1 meant there was the risk of bias and the practices of phenomenology such as the epoché technique support mitigating that bias. Secondly, it was paramount for me as a researcher that the authentic voice of the lived experience of the participants was captured and presented as much as possible in their own words. Phenomenological studies lend themselves towards a narrative style of reporting. Lastly, the criteria used to determine the use of phenomenology are applied when research problems require a profound understanding of complex human experiences common to a group of people such as the participants of this study (Creswell & Poth, 2016). The following sections explain these rationale in more detail.

A general qualitative research interview is a professional conversation with the intention of gaining an understanding of the perspective of the participants to help “unfold the meaning of their experiences, to uncover their lived world prior to scientific explanations” (Brinkmann & Kvale, 2015, p. 3). An interview gives participants an opportunity to present their beliefs and opinions and provides a context for the researcher to understand that behaviour (Cohen et al., 2011; Marcucci, 2011). When it is possible to identify people who are in key positions to understand a situation, as was the case in this study, a more elaborate answer can be obtained through the interview process (Clarke & Braun, 2013). Participants are more likely to speak

openly and in depth about their experiences compared to writing out answers in detail in a questionnaire (Marcucci, 2011). This is especially relevant in a New Zealand context where the cultural practice of “*kanohi ki te kanohi* [face-to-face communication] is a facet of human behaviour and a key principle of being and doing as Māori” (Ngata, 2017, p. 178). Furthermore, interviews must consist of enough time to explore the topic in depth, and generally last approximately 60 to 90 minutes (Polkinghorne, 1989; Seidman, 1998). Due to the COVID-19 pandemic lockdown imposed by the New Zealand government, the 28 interviews were conducted virtually by Zoom. The interviews ranged in duration from 45 to 90 minutes.

Understanding the “social and psychological phenomena from the perspectives of people involved” (Welman & Kruger, 2001, p. 189) was key to answering the research question of this study. Phenomenological researchers are interested in people’s subjective experiences and interpretations of the world and describing a participant’s experience in the way they experience it, not from a theoretical standpoint (Acharyya & Bhattacharya, 2019; Bevan, 2014). Furthermore, those people who experience the same phenomenon share a common essential experience and can transcend that experience by describing it in order to expose meaningful structures of the phenomenon under investigation (Moustakas, 1994; Patton, 2002). Upon completion of a phenomenological study, a reader of the study should be able to refer to the phenomenon as described by Polkinghorne (1989): “I understand better what it is like for someone to experience that” (p. 46).

In-depth, one-on-one interviews are the central focus for conducting a phenomenological study (Bevan, 2014; Creswell, 2014; Groenewald, 2004; Husserl & Moran, 2012; Moerer-Urdahl & Creswell, 2004; Moustakas, 1994; Patton, 2002; Polkinghorne, 1989; Seidman, 1998). Kvale (1996) clarified data captured during a phenomenological interview is “literally an Inter View, as in an interchange of views between two persons conversing about a theme of mutual interest,” where the researcher attempts to “understand the world from the subjects’ point of view, to unfold meaning of peoples’ experiences” (Kvale, 1996, pp. 1-2).

Furthermore, Seidman (1998) stated, “the method of in-depth, phenomenological interviewing applied to a sample of participants who all experience similar structural and social conditions give enormous power to the stories of a relatively few participants” (p. 48).

There are commonalities with the phenomenological one-on-one interview method and the *unstructured interview* method. Data collected from unstructured interviews are shaped largely by what the respondent tells the researcher in the way that they normally speak. Unstructured interviewing is a powerful research technique when not much is already known about the topic being researched, or where the topic is particularly complex such as that of teacher-leaders carrying out a new role within a new government initiative (Tolich & Davidson, 2018). The researcher’s role in the interview process is to guide the respondent into particular areas with very open questions but the direction of the conversation is decided by the participant where “the focus is on reproducing the world of the person being interviewed, not attempting to make sense of it from some predetermined perspective...in reality, such interviews are not unstructured so much as they are *loosely* structured” (Tolich & Davidson, 2018, p. 240) This allows the respondent’s “stream of consciousness” to flow spontaneously giving the account, without interruption by the researcher (Tolich & Davidson, 2018).

Phenomenological questions need to be “directed to the participant’s experiences, feelings, beliefs and convictions about the theme in question” (Welman & Kruger, 2001, p. 196) and the “questions are generally broad and open ended so that the subject has sufficient opportunity to express his or her viewpoint extensively” (Giorgi, 1997, p. 245). Moustakas (1994) also commented that the “timely way in which questions are posed, facilitates full disclosure of the co-researcher’s experience” (p. 116). Moustakas’s use of the term “co-researcher” is indicative of the collaborative nature of phenomenological research; however, for this study, the term participant(s) is used. To determine the prominent themes to explore that are important to the participants, and align with the research, the interview questions were determined post analysis of the Phase 1 questionnaires and using phenomenological theory as

shown in Table 3.2. Further probing questions can be posed where the respondent “truncated a portion of the account or expressed some-thing that seemingly could be more elaborated” (Broome, 2022, p. 206). This approach enabled the opportunity to authentically capture and present the participant’s experiences as teacher-leaders in their own words. More specifically for this study, a transcendental phenomenological interview method was utilised, as advocated by Moustakas (1994), because the emphasis on “transcendental” means to set aside prejudgements and preconceptions of the phenomenon as much as possible, through the process of epoché to see the meaning of the phenomenon new and afresh through the descriptions of the participants.

Epoché is a Greek word meaning “to refrain from judgement, to abstain from or stay away from the everyday, ordinary way of perceiving things” (Moustakas, 1994, p. 33). Phenomenologists, in contrast to positivists, believe that the researcher cannot be detached from their presuppositions and should not pretend otherwise (Hammersley, 2005; Husserl & Moran, 2012). Furthermore, “primordial” experiences cannot be described authentically unless both the researcher and the participant “attempt to put aside assumptions about the phenomenon and the interpretations that occurred to us subsequent to the experience to see the phenomenon anew as it was experienced” (Caelli, 2001, p. 276). Therefore, the researcher needs to identify assumptions about a phenomenon and try to suspend them or put them “on hold,” also known as phenomenological bracketing or epoché (Groenewald, 2004; Husserl & Moran, 2012; Moustakas, 1994). The epoché technique was useful in the management of my own personal experience and positioning as explained in Section 1.1. It was important that I mitigated any bias in the research findings given my previous involvement in the IES initiative as an AST and then as a Kāhui Ako government official. Prior to starting the interview process, and then subsequently before each interview, I took a few moments to engage in the practice of epoché by thinking about my own perceptions of Kāhui Ako and the AST role specifically and intentionally cleared my mind, “setting aside predilections, prejudices, predispositions, and

allowing things, events, and people to enter anew into consciousness, and to look and see them again, as if for the first time” (Moustakas, 1994, p. 85). An example of this practice in action is attached in Appendix F. The total removal of conscious and unconscious beliefs, preconceived notions, judgements, thoughts, and biases is rarely, if ever, achieved. However, the practice of continually reflecting and practising the epoché process increased my competency in examining the phenomenon with a fresh perspective and aided in my openness to receive new insights and information (Moustakas, 1994). As well as epoché, transcendental phenomenologists utilise universal structures and techniques such as lifeworld, natural attitude, modes of appearing, imaginative variation and memoing (Husserl & Moran, 2012; Moustakas, 1994).

Lifeworld is described as the consciousness of the world, including objects or experiences within it, and is always set against a horizon that provides context (Husserl & Moran, 2012). It is precisely the experience of the lifeworld in natural attitude that is under investigation in phenomenological research (Giorgi, 1997).

Natural attitude is the way in which each of us is involved in the lifeworld. Being in a natural attitude is effortless, and the normal unreflective mode of being engaged in an already known world (Husserl & Moran, 2012). An additional element related to natural attitude is how phenomena are presented in different ways to individuals (Bevan, 2014).

Modes of appearing involve the process of examining how the phenomenon appears to us as the observer. The idea is that we understand “see” more than we see; in other words, we see something but we also have knowledge beyond what we directly perceive (Harvey, 2018). Husserl gave the example that when we see a six-sided die with a “one” spot on the front face, we know, without seeing it, that the side we cannot see has a “six” spot (Husserl & Moran, 2012).

Imaginative variation is the term used by Moustakas (1994) to refer to the process of describing how one experiences the phenomenon, seeking possible meanings by varying frames of reference and different perspectives or vantage points. This process reveals the essence of an

experience, as only those aspects that are invariant to the experience of the particular phenomenon will remain unchanged through the variation (Husserl & Moran, 2012). Along with the epoché and phenomenological reduction, imaginative variation is a method available to phenomenological researchers for the purpose of examining how a particular phenomenon presents itself to the consciousness of the participant and the researcher. This method involves the researcher considering the phenomenon being experienced from different perspectives by imaginatively altering various features of the phenomenon (Turley et al., 2016). Participants often struggle in interviews to articulate or verbalise their experiences. In this study, imaginative variation was utilised in two ways, in the analysis of the transcripts and also in the interview design by asking the question “What would you advise your former self from where you stand now?”, as shown in Table 3.2, as an interview technique to “elicit a richly detailed and insightful experiential account of a phenomenon” (Turley et al., 2016, p. 1).

The use of *field notes* and *memoing* were useful because researchers can be easily absorbed in the research process and may fail to reflect critically on what is happening (Bevan, 2014). In qualitative research, especially phenomenological studies, the interplay between researcher and data is crucial to the generation of knowledge that reflects the breadth and depth of human experience (Birks et al., 2008). For this study, four types of field notes were used:

- Observational notes (ON) – “what-happened notes” deemed important enough to the researcher to make.
- Theoretical notes (TN) – “attempts to derive meaning” as the researcher thinks or reflects on experiences.
- Methodological notes (MN) – “reminders, instructions or critique” to oneself on the process.
- Analytical memos (AM) – end-of-a-field-day summary or progress reviews.

(Groenewald, 2004, pp. 48–49).

The use of chronological memoing also enabled a data depth that would otherwise be difficult to achieve. This research strategy provided an opportunity to be immersed in the data, explore the meanings that the data hold, maintain continuity and sustain momentum in conducting the research (Groenewald, 2004). As a chronicle of the research journey, memos remain as an indelible, yet flexible, record for personal retention or dissemination to others. This technique is remembered easily “by using the mnemonic ‘MEMO’: mapping research activities; extracting meaning from the data; maintaining momentum; opening communication” (Birks et al., 2008, pp. 69–70). Table 3.2 shows a summary of the transcendental phenomenological research design for phase 2 of this study.

Table 3.2

Phase 2: Transcendental Phenomenological Interview Structure

Phenomenological attitude	Researcher approach	Interview structure	Method	Question
E P O C H E	Acceptance of natural attitude of participants	Contextualisation <i>Eliciting the lifeworld in natural attitude</i>	Descriptive narrative context question	Tell me how you came to be an AST.
	Reflexive critical dialogue with self as a researcher	Apprehending the phenomenon <i>Modes of appearing in natural attitude</i>	Descriptive narrative unpacking the phenomenon	Tell me what it is like to be an AST.
	Practice active listening	Clarifying the phenomenon <i>Meaning through imaginative variation</i>	Questions of modes of appearing	What would you advise your former self from where you stand now?
		Summarisation <i>Final words related to the phenomenon</i>	Participant freedom or voice. Unstructured	Are there any other points or messages not yet mentioned you would like noted as part of this research?

Note: Adapted from Bevan (2014) “Figure 1. A structure of phenomenological interviewing” (p.139).

Broome (2022) stated that a robust phenomenological study cannot simply import phenomenological ideas, instead must involve conducting a “demonstrably phenomenological

analysis” (p. 201) to be considered a phenomenological study. He further expressed that, in his opinion, phenomenological research “particularly a dissertation or thesis, must generate phenomenological findings, not just general qualitative results” (p. 201). Therefore, to ensure an authentic transcendental phenomenological study, the data explication design for this study was crucial and will be explained in the next section.

3.5.2 Interview Explication Design

Phenomenologists prefer the term *data explication* to the term *data analysis*, which means a:

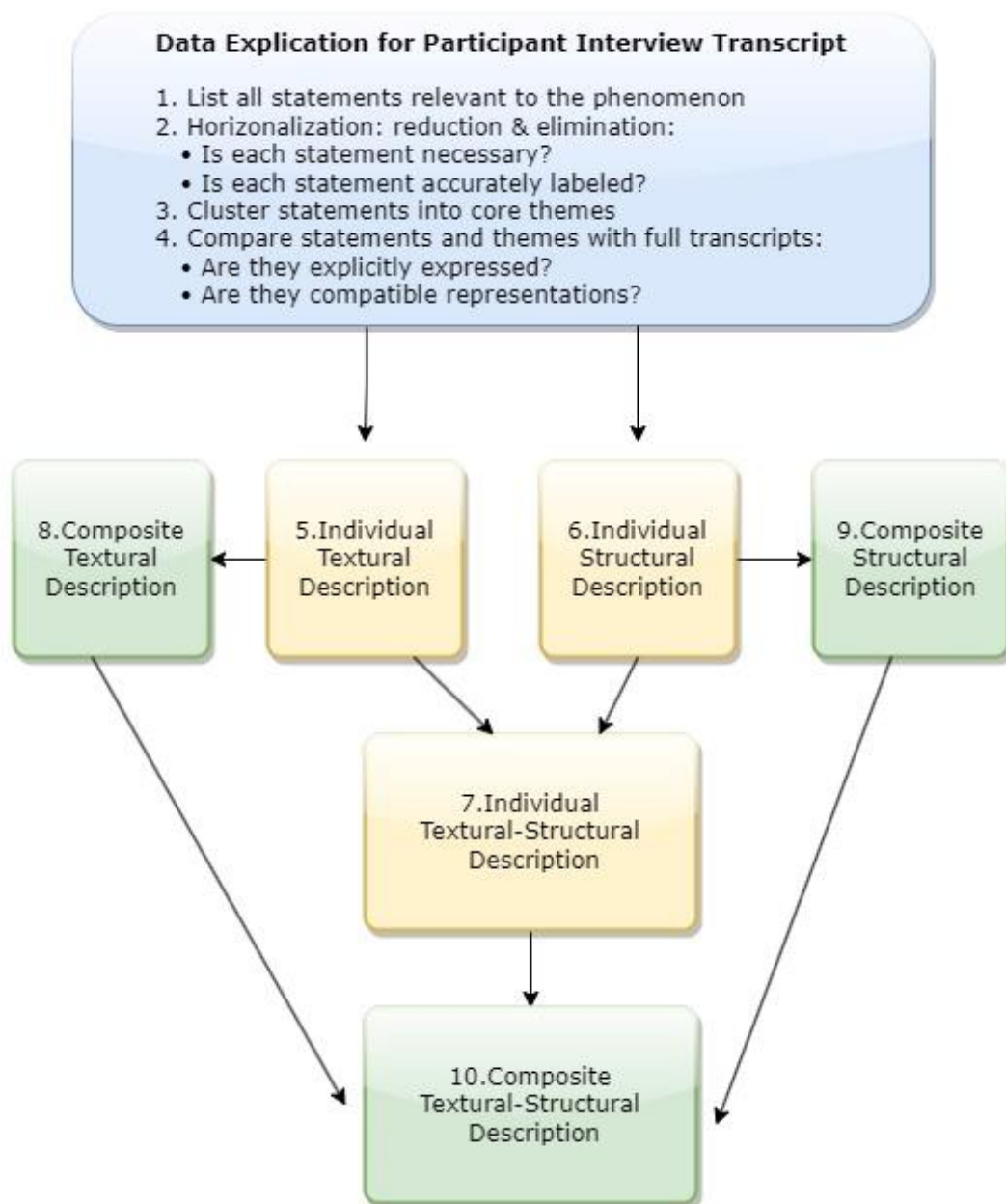
Breaking into parts and therefore often means a loss of the whole phenomenon whereas explication implies an investigation of the constituents of a phenomenon while keeping the context of the whole, the process of “unfolding” and of “making clear” the meaning of things, so as to make the implicit explicit. (Hycner et al., 1999, p. 161)

Phenomenological research does not employ an empirical coding and thematic analysis like any other qualitative social research (Broome, 2022; Clarke & Braun, 2013; Saldaña, 2021). Instead phenomenological study results must demonstrate that the “lived experience” was constituted by aspects of the experience that are not merely shared or frequent but, rather, essential (Broome, 2022).

Interviews are by far the most frequent method for data collection in phenomenological research, yet, despite this dominance some researchers have argued there is limited instruction as to how they should be undertaken and there is an incorrect assumption that general qualitative interview data analysis methods will suffice (Bevan, 2014). Hence, to strengthen the credibility of this phase as a phenomenological study, due care and systematic steps of data explication were followed that align strongly with a transcendental phenomenological design (Moerer-Urdahl & Creswell, 2004; Moustakas, 1994). The transcribing of the interviews was first completed by using the Zoom recording functionality so that I could familiarise myself with the data (Clarke & Braun, 2013) then the following 10 steps as recommended by Moustakas (1994) were modified and used for this study as shown in Figure 3.1 (pp. 120-121).

Figure 3.1

Summary of Moustakas's (1994) Phenomenological Data Explication Adapted for this Study



3.5.2.1 Listing and Preliminary Grouping. Each interview transcript was reread while watching and listening to the recordings to check for accuracy. The transcripts were then imported into NVivo computer software system to aid data management; however, all analysis was completed by me, not the programme.

3.5.2.2 Horizontalisation. Is part of the phenomenological reduction process, whereby equal value is given to all the participants' statements and included the removal of all repetitive statements as well as those that did not relate to the research question (Eddles-Hirsch, 2015).

Each statement was then examined to determine the invariant constituents based on two requirements:

- (i) Is the statement necessary for understanding the phenomenon?
- (ii) Is it possible to abstract and label this statement?

If the answers to the questions were yes, then the statement was labelled for its specific meaning unit and considered as a horizon of the phenomenon. If the answer was no, then the statement was eliminated. The remaining horizons were then the invariant constituents or meaning units of this phenomenon.

3.5.2.3 Clustering and Thematising the Invariant Constituents. The invariant constituents were clustered into relevant themes as the core themes of the phenomenon. Where appropriate, terms that already existed in the literature, empirical evidence, and conceptual frameworks for this study on teacher-leadership and professional identity development were used.

3.5.2.4 Identification of the Invariant Constituents and Themes by Application. The invariant constituents and their specific theme were compared with the full transcript for each participant to check for validity and the following questions were considered:

- (i) Are the invariant constituents and themes explicitly expressed in the full transcripts?
- (ii) If they are not explicitly expressed, are they compatible representations?

If invariant constituents were not explicit or compatible with the full transcripts, they were deleted due to not being relevant to the participant's experience and description of the phenomenon.

3.5.2.5 Individual Textural Descriptions. Using the validated invariant constituents and themes, individual textural descriptions were constructed for each participant on the experience of the phenomenon, including examples from the transcripts. Textural descriptions are themes which describe the "what" of the individual's experience and are descriptions of the observable characteristics of the phenomenon (Moustakas, 1994).

3.5.2.6 Individual Structural Descriptions. Using the validated invariant constituents and themes, an individual structural description was constructed for each participant on the experience of the phenomenon, including examples from the transcripts. Structural descriptions are descriptions that examine the “how” of the individual’s experience such as the conditions, situation and context including the emotional, social, and cultural connections between what participants say (Moustakas, 1994).

3.5.2.7 Individual Textural-Structural Descriptions Synthesis. Using the individual textural descriptions and the individual structural descriptions, a textural-structural description for each participant was constructed, which synthesised the invariant constituents, meaning, and themes providing an integrated description of the essence of the experience of the phenomenon for each individual.

3.5.2.8 Composite Textural Description. Using the individual textural descriptions, a composite textural description of the experience of the phenomenon for the group was constructed.

3.5.2.9 Composite Structural Description. Using the individual structural descriptions and imaginative variation, a composite structural description of the experience of the phenomenon for the group was constructed.

3.5.2.10 Composite Textural-Structural Description Synthesis. Using the individual textural- structural descriptions, a composite textural-structural description that synthesised the meanings and essences of the lived experience of the ASTs was constructed.

3.5.2.11 Validation of the Data. For phenomenological studies, Moustakas (1994) used the term *validation of data* to refer to what other qualitative researchers refer to as *trustworthiness* or *verification* (Moerer-Urdahl & Creswell, 2004). Validity is typically thought of as a term used in association with quantitative studies; however, in explaining phenomenological research methods, both Polkinghorne (1989) and Seidman (1998) used the term *validity* to refer to “whether or not the findings can be trusted” (Polkinghorne, 1989, p. 57;

see also Seidman, 1998). Polkinghorne (1989) further stated that for phenomenological research validity is centred on the question, “Does the general structural description provide an accurate portrait of the common features and structural connections that are manifest in the examples collected?” (p. 57). More specifically, a phenomenologist researcher is required to address the following questions to validate the data:

- 1) Did the interviewer influence the contents of the subjects’ descriptions in such a way that the descriptions do not truly reflect the subjects’ actual experience?
- 2) Is the transcription accurate, and does it convey the meaning of the oral presentation in the interview?
- 3) In the analysis of the transcriptions, were there conclusions other than those offered by the researcher that could have been derived? Has the researcher identified these alternatives and demonstrated why they are less probable than the one decided on?
- 4) Is it possible to go from the general structural description to the transcriptions and to account for the specific contents and connections in the original examples of the experience?
- 5) Is the structural description situation-specific, or does it hold in general for the experience in other situations? (Polkinghorne, 1989, p. 57)

Specific and multiple steps were taken to maximise validation. This included carefully designing the questions to be as open and nonleading as possible and being intentional that any follow-up questions and prompts were of the same vein. The Zoom recording and transcription functions were used to accurately capture the participants’ responses. The recordings and transcripts were made available to the participants who were given the opportunity to correct or remove any aspects that they believed, on reflection, were not a true account of their experience. All participants were satisfied with the recordings and transcripts.

3.5.2.12 Triangulation. On the completion of both phases of the study, the findings needed to be triangulated. Triangulation is defined as the use of multiple methods when

studying the same phenomenon for the purpose of increasing study credibility (Rowley, 2014). Triangulation has the potential to increase the breadth and depth of understanding of the study, increase the study's accuracy and validate the measures (Asselin, 2003; Cohen et al., 2011; Hussein, 2009). The combined data from both studies needed to be reported selectively, accurately, and clearly and “tell a story” of the participants' experiences as teacher-leaders in Kāhui Ako (Hussein, 2009).

3.6 Participant Sampling Design and Demographics

The findings of any research study are critically dependent upon participants and the composition of sampling; therefore, the process of selecting and interacting with participants needed to be sound (Creswell & Poth, 2016; Teddlie & Tashakkori, 2010). To determine the most appropriate approach for this study that aligned with the research aim, the strengths, weaknesses, and potential biases associated with different sampling methods were considered. The critique concluded with the decision to use a combination of “purposive” and “snowball” sampling due to this study targeting one specific group of education professionals who had all experienced the same phenomenon and because access to this group of individuals was gained through the permission of another.

3.6.1 Phase 1: Sampling Design and Execution

The rationale for utilising a purposive criterion sampling method was because the participants met a narrow and specific criterion of being currently or previously employed as an AST (Acharyya & Bhattacharya, 2019). Purposive criterion sampling also allowed the selection of a representative sample of the AST population as an inference of results to the wider population (Creswell & Poth, 2016).

Snowball sampling, also known as chain referral sampling or network sampling, is a nonprobability sampling method in which an initial sample “seed” group is used to recruit participants (Naderifar et al., 2017). The advantages of using the snowball sample design for this study included cost-effectiveness, inclusivity and accessibility of participants via an email

invitation with the intended purpose of the study being passed on to potential participants (Naderifar et al., 2017). The main disadvantage and limitation of the snowball method was the lack of control of how many potential participants received the invitation, and who they were. As well as unintended biases due to relying on the original seed group of Kāhui Ako leaders to pass on the invitation to the ASTs in their Kāhui Ako.

To initiate the research process, Kāhui Ako leaders nationally were sent an email invitation for the ASTs in their Kāhui Ako to be involved in the study. These email addresses were available publicly on the Education Counts website (MOE, 2020). This email and all further correspondence were sent from my University of Auckland email address rather than any personal or work email addresses. For ethical reasons, the selected sample of Kāhui Ako leaders did not include any of the 13 Kāhui Ako in Auckland that I had responsibility for as an MOE employee at the time.

As of March 2020, the time of this study, 187 Kāhui Ako nationally had appointed 228 leaders. Some Kāhui Ako had appointed more than one leader in a shared role. After removing the 13 Kāhui Ako I worked with, a total of 199 Kāhui Ako leaders from 164 Kāhui Ako were emailed with the original request to be part of the study. A significant limitation of this method of data collection is that the response rate can be variable as it is entirely dependent on the motivation of the respondents; they can simply ignore the email (Naderifar et al., 2017). To maximise response rates the initial invitation email was addressed personally to the leader(s) and included an attached questionnaire participant information sheet (QPIS) and the Kāhui Ako leader consent form (CF). The QPIS and electronic consent for the participants was also included in the Qualtrics questionnaire and participants were asked to give their consent before completing the questionnaire. A reminder email was also sent to the Kāhui Ako leaders' 2 weeks later. As shown in Table 3.3, 50 Kāhui Ako out of possible 164 Kāhui Ako agreed to be part of the study, a 30% response rate. This rate had doubled after a reminder email was sent.

Table 3.3*Sampling Summary*

Coding key	Number at 27/3/20	Number after reminder
Kāhui Ako leader declined to be part of the study	4	6
Positive response but declined, e.g., No ASTs employed yet	2	3
Kāhui Ako leader agreed to be part of the study	24	50

3.6.2 Phase 1: Participants' Demographics Summary

A total of 154 former and current AST participant responded to the questionnaire from the 50 Kāhui Ako who had agreed to participate. Ninety percent of the participants ($n = 139$) were current ASTs, 10% of the participants ($n = 15$) were former ASTs. A further breakdown of the demographics of those participants is shown in Table 3.4.

Table 3.4*Phase 1 Demographics Summary*

Question	Category	<i>n</i>
Gender	Females	121
	Males	33
Ethnicity *Other = Dutch, Caribbean, Indian, British	European / Pākehā	105
	NZ Māori	24
	*Other	18
	Pasifika	5
	Asian	2
Age range	Between 30–39 years	32
	Between 40–49 years	84
	Between 50–60 years	35
	Over 61 years	3
Geographical area (Choosing the closest city)	Whangarei	4
	Auckland	50
	Hamilton	10
	Rotorua	5
*Others mentioned	Tauranga ($n = 7$)	8
	Hawkes Bay ($n = 5$)	1
	West Coast South Island ($n = 2$)	8
	Te Puke ($n = 4$)	9
	Nelson	9
	Christchurch	18
	Dunedin	8
	Invercargill	2
	*Other	31

Question	Category	<i>n</i>
Rural vs urban Kāhui Ako Large = 10 or more schools Medium = between 4 and 9 schools Small = 3 schools or less	Large mostly rural	26
	Large mostly urban	60
	Medium-sized mostly rural	15
	Medium-sized mostly urban	51
	Small mostly rural	1
Teaching sector representation	Lower primary (ECE-Y3)	27
	Middle primary (Y3-Y6)	28
	Upper primary (Y7-Y8)	37
	Secondary (Y9-13)	60
Time in the AST role	Less than 6 months	32
	Less than 12 months	19
	More than 1, less than 2 years	54
	More than 2, less than 4 years	47
	More than 4 years	2
Number of OTHER ASTs employed at the SAME time. *Ranging between 6 and 11 other ASTs	None (I am the only AST)	22
	One other	21
	Two others	29
	Three others	35
	Five others	8
Number of OTHER WSTs employed at the SAME time. *Ranging between 33 and 50	*More than 5	18
	Between 1-5	21
	Between 6-10	30
	Between 11-15	18
	Between 16-20,	16
	Between 21-25	23
	Between 26-30	19
	*More than 30	25

3.6.3 Phase 2: Sampling Design and Execution

At the completion of the Phase 1 electronic Qualtrics questionnaire, participants were asked if they would like to partake in Phase 2 interviews and were provided access to a separate Google form to register their interest and provide basic demographic information. Out of the 154 Phase 1 participants 60 volunteers indicated an initial interest in Phase 2.

Sample size and composition in qualitative interviews have been discussed in the literature, with assorted recommendations on the size and makeup of sample participants (Gubrium et al., 2012). Sample sizes need to be big enough to ensure that multiple stances have been taken into account (Creswell & Poth, 2016). Furthermore, in phenomenological studies, researchers have suggested a range of optimal numbers for samples. Creswell and Creswell (2005) recommended between 5 and 25 participants. Thomas and Pollio (2002) suggested that

an appropriate sample size can range from 6 to 12 participants and Boyd (2001) recommended a range of 2 to 10 participants. This variation, coupled with the wider context of the study, made it difficult to predetermine a sample size (Gubrium et al., 2012). My supervisors and I mutually agreed on a sample size of 28 potential participants to be invited for Phase 2 due to this being approximately half of the volunteers, proportional to the 154 Phase 1 participants, and finally because the interviews would be conducted online during a national COVID-19 pandemic lockdown and there would be fewer restraints of other commitments for both me and the participants.

The following process was followed as part of sample selection from Phase 1 volunteers:

1. Each volunteer was assigned an identification code INTP (interview participant) and numbered 1 to 60.
2. Any known potential conflicts for the researcher and supervisors were disclosed, and six volunteers were eliminated.
3. Identification codes INTP1 to INTP60 minus six conflicts were then placed under the appropriate category headings:
 - Gender: Male, female
 - Ethnicity: European / Pākehā, Māori, Pasifika, Other
 - Education sector representation: Lower primary (ECE-Y3), middle primary (Y3-Y6), upper primary (Y7-Y8) and secondary (Y9 -13)
 - Geographical region: Region 1: Northland, Auckland, Region 2: Waikato, Bay of Plenty; Region 3 Gisborne, Hawkes Bay; Region 4: Taranaki, Manawatu, Whanganui, Wellington; Region 5: Tasman, Nelson, Marlborough, Canterbury; Region 6: West Coast, Otago, Southland
4. A possible 28 interview candidates were selected from each category and sent an interview participant pack as described below.

5. Of the original volunteers, two from the secondary school category (INTP3) and Region 3 category (INTP10) had changed their mind and declined so consequently were replaced by two more from the same categories, INTP32 and INTP30.
6. The chosen volunteers were then sent an interview participant pack that consisted of:
 - a) Interview PIS (IPIS) (See Appendix D.). The IPIS explained the purpose of the research, introduced the researcher, explained why their personal involvement was valued, offered an assurance of confidentiality, captured their interest and was clear about the time commitment that was required.
 - b) Qualtrics questionnaire link to a form (see Appendix E) that contained:
 - i. An electronic consent form.
 - ii. Interview date and time preferences.
 - iii. Demographic questions. As Phase 1 was anonymous Phase 2 participants' original answers could not be identified; questions included:
 - Gender, age, ethnicity, the education level that they mainly taught at.
 - An indication of time they had been in the AST role.
 - Size and demographics of the Kāhui Ako in which they were employed.
 - The number of other ASTs and WSTs the participant worked with.
 - Previous leadership experience and responsibilities, and whether they continued to have other leadership responsibilities while being an AST.

3.6.4 Phase 2: Participants' Demographics Summary

All 28 participants were currently employed as an AST and had been in their role from less than 6 months to more than 2 years, but less than 4 years as shown in Table 3.5. As part of the demographics section, participants were also asked about their middle-leader experience and the other leadership responsibilities they held alongside the AST role, as seen in Appendix E and Table 3.5.

Table 3.5*Phase 2 Demographics*

Question	Category	<i>n</i>
Gender	Females	17
	Males	11
Ethnicity	European / Pākehā	22
	NZ Māori	4
	Other	2
Age range	Between 30-39 years	5
	Between 40-49 years	12
	Between 50-60 years	10
	Over 61 years	1
Geographical area	Auckland	6
	Canterbury	6
	Bay of Plenty	3
	Marlborough	3
	Manawatu-Wanganui	2
	Hawkes Bay	2
	Otago	1
	West Coast South Island	1
	Wellington.	1
Rural vs urban Kāhui Ako Large = 10 or more schools Medium = between 4 and 9 schools	Large mostly rural	7
	Large mostly urban	7
	Medium sized mostly rural	6
	Medium sized mostly urban	8
Teaching sector representation	Lower primary (ECE-Y3)	5
	Middle primary (Y3-Y6)	4
	Upper primary (Y7-Y8)	6
	Secondary (Y9-13)	13
Time in the AST role	Less than 6 months	4
	Less than 12 months	4
	More than 1 less than 2 years	9
	More than 2 less than 4 years	12
How many OTHER ASTs employed at the SAME time	None (I am the only AST)	6
	One other	3
	Two others	7
	Three others	7
	Five others	2
	Six others	2
How many OTHER WSTs employed at the SAME time	Between 1-5	5
	Between 6-10	12
	Between 11-15	2
	Between 16-20,	3
	Between 21-25	2
	More than 25 (highest was 42)	4

3.6.4.1 Middle-Leadership Experience. Participants described a range of previous middle-leadership experiences, professional background experiences and previous roles they had held before their appointment into the AST role. Curriculum leadership was the highest proportion of previous experience with 23% ($n = 17$) of the participants having been a curriculum leader within their school, followed closely by those who had held other middle-leaders positions such as team-leader, 19% ($n = 14$); head of department (HOD), 9% ($n = 7$); and syndicate-leader, 9% ($n = 7$). The participant group also included 12% ($n = 9$) secondary school teacher-leaders who had held pastoral positions as a dean.

Table 3.6

Participants' Previous Middle-leadership Experience

Question	Description	<i>n</i>	%
Q1. "How many years of middle-leadership experience did you have BEFORE becoming an across school teacher?"	1 to 2 years	2	7
	2 to 3 years	2	7
	3 to 4 years	1	4
	4 or more years	23	82
Q2. "In what roles did you have previous middle-leadership experience?"	Team-leader	14	19
	Curriculum-leader	17	23
	HOD	7	10
	Dean	9	12
	*SENCO	3	4
	Syndicate-leader	7	9
	Not applicable	2	3
	**Positions not listed	15	20

*Special Education Needs Co-ordinator (SENCO)

**Any other positions not listed above comments:

Deputy principal ($n = 2$), within-school teacher ($n = 3$), specialist classroom teacher ($n = 2$), director of religious studies, mentor teacher, teacher librarian, teaching assistant principal, cultural advisor, acting principal, national assessment facilitator NZQA, PPTA executive. Plus, a clarification comment from one of the participants "I am senior management not middle management."

3.6.4.2 Other Leadership Responsibilities. A high percentage of participants (89%, $n = 23$) stated they were appointed in an AST role while continuing to be active in their “previous” role. These participants expressed both a desire and pressure from their schools not to relinquish their previous role despite breaching the NZEI and PPTA collective employment agreements by holding too many management units and not meeting the minimal teaching component for the AST role (MOE, 2016b). The relevance of the demographics to the participants’ lived experience of the AST role will be discussed in the findings chapter.

CHAPTER 4: Questionnaire Findings

4.1 Introduction

This chapter presents the findings from Phase 1 of the study. The overall structure of this chapter follows the sequence of the questionnaire as shown in Appendix A. On average, it took 17 minutes for the 154 participants to complete the questionnaire. The response rates' and qualitative open-ended questions and additional comments were high, with 148 of the 154 participants (96%) providing 1,155 additional comments. The comment frequency ranged from 1 to 28 comments per participant with 10 comments being the most frequent ($n = 17$ participants). The additional comments were structured in such a way as to represent the thematic coding process as outlined in Section 3.4.2. The anchor coding nodes included:

- recruitment motivation and rationale for applying for the AST role.
- positive and negative influencing factors on the participant's experience as an AST.
- critical incidents; opportunities and challenges of the AST role.
- desirable skills and characteristics required of an AST to be successful, from the perspective of the participants.

It was a personal preference as a researcher to capture and present the participants authentic voice in the report writing as much as possible. However, to maximise a full range of participant perspectives and experiences were represented in this chapter, and not dominated by a few, all participant comments that have been used were tracked in an Excel spreadsheet for frequency.

4.2 Q1. Rationale for Applying for the AST Role.

Question 1 sought to gain an understanding of why the participants applied for the AST role. The answers revealed a strong indication that the participants were actively looking for career opportunities within both the early learning and schooling system to develop their areas of professional interest and / or their strengths. Their belief in the kaupapa (principles) that

underpinned Kāhui Ako, the desire to make a difference for ākonga and effect change where they were employed and / or in their community were expressed as strong motivators. The provided recruitment motivation descriptions were adapted from a previous study of another teacher-leader initiative, the SCT role presented in Section 1.4.2 (Ward, 2007).

The results suggests that the AST position appealed to the participants as a different career choice compared to the more traditional middle-leader roles and was perceived as an opportunity to utilise their expertise and knowledge while remaining focused on classroom practice. As shown in Table 4.1, career choice was the highest scoring rationale at 45% ($n = 69$) followed closely by interesting interlude at 44% ($n = 66$).

Table 4.1

Question 1 Results Rationale for Applying for AST Role

Q1 out of 7 – Description BEST describes rationale choosing to apply for the Kāhui Ako AST role.										
*Rationale description *Participants could choose one option per description	Describes me extremely well		Describes me very well		Describes me moderately well		Describes me slightly well		Does not describe me	
	#	%	#	%	#	%	#	%	#	%
Stepping stone	30	20	28	19	35	23	23	15	34	23
Constructive downsizing	3	2	4	3	7	5	9	6	127	85
Career choice	69	45	41	27	27	18	8	5	7	5
Interesting interlude	66	44	39	26	21	14	8	5	16	11
Something else	47	39	13	11	5	4	2	2	54	45

Table 4.2 shows a combined total of “Describes me extremely well” and “Describes me very well.” The combined scores show that 71% ($n = 110$) of the participants’ rationale for applying for the AST role was a career choice followed by an interesting interlude (68%, $n = 105$).

Table 4.2*Question 1 Combined Results: Rationale for Applying for AST Role*

Combined totals	Stepping stone		Constructive downsizing		Career choice		Interesting interlude		Something else	
	#	%	#	%	#	%	#	%	#	%
Describes me extremely / very well	58	38	7	5	110	71	105	68	60	39

Table 4.3 summarises a thematic analysis of “something else” and “any further comments on your rationale for applying for the AST role” from highest to lowest frequency responses. Participants described a range of reasons from professional to more personal or altruistic goals. The significance of what motivated participants to apply for the AST role and how this compared to the reality of their experiences, and therefore influenced their professional identity development, will be discussed in the next chapters.

Table 4.3*Question 1 Thematic Analysis of Recruitment Rationale*

Coding node	Frequency	Example
Networking connections: Existing and creating new	17	I am interested in education in general, so I welcomed the opportunity to work across different schools They are all schools in my local neighbourhood, so it also gives me the opportunity to engage more with my local community. (SURP68)
To enact change	17	I wanted to bring about whole school and community changes as opposed to always working within the strict boundaries that often comes with middle-management roles – an opportunity to bring about change in a nontraditional way and to work with people who I wouldn't normally get to work with. It is exciting. (SURP115)
Kaupapa aligned with self	13	The kaupapa that underpinned our Kāhui Ako direction was one that spoke to me. It was solutions based in Kaupapa Māori and Critical Theories. (SURP29)
Opportunity existed / something different	12	I was the HOD for Mathematics for 3 years and it was time for a change. I am very curious about how education works in a primary and intermediate setting. While I was unsure of what will eventuate from the position and how much actual change, I can implement, I am super interested in learning new things. (SURP4)
Encouragement to apply for the role by champions	9	I would not have applied for the position on my own, but I rang my previous principal to seek advice and he encouraged me to go for it as he knew how unhappy and frustrated, I was as a teacher. (SURP39)
Existing involvement in Kāhui Ako / community	8	I am teaching in the region that I grew up in and therefore knew the community well. I also held other responsibilities within the community and could see a correlation with the other work that I was doing that would link to the Kahui Ako position. (SURP130)
Future career opportunities	7	I wanted this pathway to lead to further leadership development. This was a key motivator for me – and to learn more about my own leadership practice. I have the first year of my master's with a focus on mentoring teachers as I had hoped to put some of this knowledge into practice in a nontraditional space. (SURP52)
Role specific to skills, experience, or passion	7	Developing te ao Māori in my school is something I am passionate about and have excelled at but always felt limited in being constrained to the one kura. When the role is perfect fit for my skill set. I saw huge potential to apply what I had learned to the other kura. These kura, though somewhat different, had similar communities and demographics to my own and I knew we could apply my knowledge and leadership style. (SURP75)
Role specific as a specialised position	5	The role was advertised as a specialist and I was the only person locally that I was aware of with the skill set needed by our COL, and I was already doing much of the work. (SURP32)
Leadership experience	5	There is no pathway for me to grow at this school and I was frustrated with the lack of leadership and collaboration and needed to challenge myself as I was thinking of leaving education. (SURP149)

Participants who identified as Māori ($n = 18$) expressed that their cultural identity was instrumental in their recruitment motivation:

As Māori I felt it was important that a Māori voice was represented at the table (SURP29).

I applied for this role due to the love of my tipuna [ancestors] and tangata whenua [indigenous people] and my endeavours to walk in the footsteps of my grandparents to amend the shortcomings to meet the bi cultural needs of our whānau [family]. (SURP152)

Participants ($n = 9$) indicated in the previous middle-leadership experience question that they had been Kāhui Ako WSTs before undertaking the AST role. Two of those participants commented in the recruitment rationale section that they viewed the AST role as an expansion to the WST role: “I was a WST, and the opportunity came up when an AST left their position. Since I was enjoying the work within my school, I wanted to expand that and work with other teachers and schools as well” (SURP89).

4.3 Q2. New Appointments National Panel Appointment Process:

Question 2 sought understanding of the participants’ experience of the NANP initial appointment process which included both a written application and an interview. The findings revealed that the appointment process was a varied experience for the AST participants. Overall, the written application and interview process gave less than half of the participants a strong understanding of the detailed expectations of the AST role. Tables 4.4–4.5 show that 44% ($n = 65$) of the participants strongly agreed or agreed that the written application process strengthened their understanding of the AST role. The data further reveals that 40% ($n = 60$) of the participants strongly agreed or agreed that the NANP interview process strengthened their understanding of the AST role and therefore positively influenced their overall professional identity development.

Table 4.4*Question 2 Results NANP Appointment Application Process*

Q2 out of 7 To what extent the initial NANP application process and information provided supported understanding of the AST role.													
Description	Strongly agree		Agree		Some what agree		Neither agree nor disagree		Somewh at disagree		Strongly disagree		Total
	#	%	#	%	#	%	#	%	#	%	#	%	#
Provided explicit information about AST role that informed decision to apply.	28	19	48	32	40	27	13	9	14	9	6	4	149
Written application strengthened understanding of the AST role.	17	11	48	32	38	26	17	11	23	15	6	4	149
NANP interview strengthened understanding of the AST role.	23	15	37	25	48	32	19	13	16	11	6	4	149

Table 4.5*Question 2 Combined Results: NANP Appointment Application Process*

Description	Strongly agree / agree	
	#	%
Provided explicit information about the AST role that informed decision to apply.	76	51
Written application strengthened understanding of the AST role.	65	44
NANP interview strengthened understanding of the AST role.	60	40

Thematic analysis of the further comments on the initial application process and how the process supported participants' understanding of the AST role were polarised. At one end of the continuum there were those who described the process as a rigorous, enjoyable and a reflective experience worthy of the position. Four participants believed that the initial appointment process was rigorous: "It was the most thorough and extensive application process I have ever been involved in" (SURP11). Three participants found the process enjoyable: "A

good challenging interview that I enjoyed. I could clearly present my strengths and ideas” (SURP56). Two participants found the process reflective “it was an extremely reflective process, especially as you had to provide evidence of your leadership” (SURP30). One participant commented they had felt supported: “I was supported well during the interview process by the panel who made me feel at ease and answered any questions that I had – no matter how trivial!” (SURP132).

Conversely at the other end of the continuum there were those participants who found the initial application process time consuming, cumbersome, culturally lacking and not equitable in application preparation expectations compared to similar roles. Even going to the extent to say more arduous than what is expected of senior-leaders roles. Nine participants found the written application lengthy and repetitive: “Initial application – paper version – was very extensive and repetitive, the longest application I have ever had to complete and submitted at nearly 25–30 pages, possibly more, plus the additional links and evidence embedded in it” (SURP144).

Seven participants commented that the written application was daunting for them and even suggested that this could be off putting for potential candidates:

I did find the form quite intense, and I felt it could put off some very capable and experienced teachers from applying. A lot of teachers are practical and knowledgeable, but I remember the form took a lot of my time. (SURP121)

Seven participants also commented on the intensity of the interview process and questioned whether it is equivalent to other leadership roles:

So many people gathered for the interview, which is intense in comparison to other positions. Previous interviews for similar level positions, I have had no more than two people interviewing me. For the AST role there were 9 people in the room including school principals, board members and ministry representatives. In terms of equity for

comparable roles it was much more intense, and I felt under much greater scrutiny. (SURP135)

Two participants commented that the initial application process supported their understanding of the AST role: “The interview clarified my understanding better and made connections to our community rather than the broad standards” (SURP46). In contrast, 15 participants did not believe that their application process supported their initial understanding of what the AST role was going to entail: “In my experience the written application and interview were about reflecting on past experience, rather than initiatives for going forward which did not help with role clarification” (SURP37). One participant also commented on the Eurocentric approach of the process:

I did not find the application culturally friendly as it was a 15-page document that I needed to promote myself which does not sit well with me as a Māori i.e., E kore te kumara e kōrero ki ōna reka [the sweet potato does not speak of its own sweetness]. I found it difficult to blow my own trumpet. (SURP108)

There were three recommendation comments in relation to the appointment process, which related to panel considerations and role clarity support:

The initial application was pretty straight forward although I do think local iwi should be part of the interviewing panel and decision making as to how this could look and proceed. (SURP76)

Would like to have had more knowledge about what other ASTs actually do rather than generic job description. (SURP79)

I think having an AST share a short narrative about the role, as part of the application process would have been beneficial. (SURP148)

4.4 Q3. New Appointments National Panel Reappointment Process

Question 3 sought understanding of the participants’ experience of the reappointment process. Like the initial process, the reappointment process, has two parts: a written application and an

interview. A total of 36% ($n = 55$) of the 154 participants had completed at least one reappointment process cycle. Tables 4.6-4.7 shows that 51% ($n = 28$) strongly agreed or agreed that the written application process was beneficial as a reflective process on their effectiveness in the AST role, 59% ($n = 29$) strongly agreed or agreed reappointment interview process was beneficial as a reflective process on their effectiveness.

Table 4.6

Question 3 Results: NANP Reappointment Application Process

Q3 out of 7 NANP reappointment process and whether the process was beneficial as a reflective process on effectiveness as an AST.

Description	Strongly agree		Agree		Somewhat agree		Neither agree nor disagree		Somewhat disagree		Strongly disagree	
	#	%	#	%	#	%	#	%	#	%	#	%
Provided with explicit information about reappointment process and what was required	15	26	23	40	9	16	4	7	5	9	2	3
Written reappointment process beneficial as a reflective process on effectiveness in the AST role	12	22	16	29	8	15	8	15	4	7	7	13
Reappointment interview process beneficial as a reflective process on effectiveness in the AST role	14	27	15	29	6	12	5	10	5	10	7	13

Table 4.7

Question 3 Combined Results: NANP Reappointment Application Process

Description	Strongly Agree / Agree	
	#	%
Provided with explicit information about the reappointment process and what was required	38	66
Written reappointment process beneficial as a reflective process on effectiveness in the AST role	28	51
Reappointment interview process beneficial as a reflective process on effectiveness in the AST role	29	56

In the further comments section, eight participants described the reappointment process as beneficial as a reflective process on their effectiveness in the AST role, while twice as many ($n = 16$) described the reappointment process as not being beneficial as a reflective process on

their effectiveness in their role and a general sentiment that it “seemed to take a lot of time away from actually doing constructive work” (SURP13). One participant also made a recommendation to “continue being transparent about the process and what best ways we can showcase our effectiveness across the COL” (SURP5).

In summary the findings indicate that the reappointment process was, like the initial application process, a polarising experience for the AST participants; from those who saw the process as useful, affirming and a reflective opportunity to those who believed it was “time consuming”, “onerous”, and “not useful”. Some participants described being distressed by the process and in turn felt that relational trust was destroyed between themselves and members of the Kāhui Ako, in particular the senior-leadership teams (SLT) and stewardship groups. What was most concerning was that some participants provided examples that demonstrated in their opinion leaders did not follow the guidelines of the collective agreement stipulations in relation to the circumstances where a contestable renewal was expected to occur and did so after 2 years instead of 4, for example:

The re-appointment process for me was awful. The principals decided after our 2 years was up, to open the job up to everyone rather than re-appoint us with no regard for us as people nor value to what we had done, they instead made us go through the entire appointment process again. It was awful. The time and energy it took to apply to be an AST is huge and I was gutted that the principals of the schools don't care about the AST as people and the huge mahi [work] we have put into the Kahui Ako. (SURP59)

4.5 Further Comments Related to the Appointment Process

In the Further Comments section for both the appointment and reappointment process, there were comments ($n = 23$) about the challenges of role clarification and perceived ambiguity of the AST role, especially for those who were part of the early adopter Kāhui Ako. Main themes included a lack of initial understanding of the AST role, lack of guidance from those involved in the recruitment process and perceptions that the role was very much an “evolve as we go”

scenario demonstrated by this quote: “I was appointed at the end of 2016, so very early on overall. It was explicitly stated that we were “building the plane as we flew it” (SURP96). Another common theme related to the evolution of the AST role from year to year, including how candidates were selected:

The role was relatively new, and no-one really knew how it would evolve. Initially, four of us from different schools were selected based on a specific strength. We were informed that they were looking for people with strengths in English, inquiry, ICT [Information and communication technologies] and leadership. I believe this was how we were initially selected. Our achievement goal turned out to be English / Writing. I believe the role evolved beyond what the initial understanding of it was. (SURP78)

The concept of specialist expertise ASTs versus generalist practitioner ASTs selected for their leadership and professional collaboration skills will be further explored in the coming chapters.

Those ASTs who did receive support, especially from PD advisors, felt that their role clarity did eventually become apparent: “We were treading new waters and with guidance from our expert partners and also our community we developed our role; but we went into the role not knowing much” (SURP50). One participant also recommended leadership PLD for those in the AST role: “This is an ever-changing role. AST leaders need PD around leadership to be successful in managing a variety of people and responsibilities. The work we achieve is done through networking, collaboration, and goodwill” (SURP5). For another participant, personnel changes impacted them in their AST role:

There has been a change in the roles and responsibilities due to a new lead principal. He has chosen to use a different structure for division of responsibilities. It would have been better if the principal had been appointed beforehand, so I had a clear idea of the requirements of the role. (SURP124)

The positive and negative impact of personnel changes on the AST role, especially when the change related to the leadership of a school and / or Kāhui Ako, was a common theme

throughout the study. The fixed term employment conditions of the Kāhui Ako roles contributed significantly to the frequency of change. Questions 4A to 4D relate to teacher-leader actions of brokering, participation, mediating, and relationships were adapted as shown in the first iteration of the teacher-leader conceptual framework (pp. 64–65) and are discussed next.

4.6 Q4A-4D Different Types of Teacher-Leader Practices.

Table 4.8 shows further comments ($n = 31$) for Q4A–4D relating to participant question confusion, unfamiliarity with concepts, agreement, and disagreement that the concepts were in theory and / or in reality associated with the AST role. Some participants also noted that they were in the early developmental stages of their AST role and therefore didn't feel they could give justice to the question. These comments also explain the variations in the response rate.

Table 4.8

Further Comments Combined Results Related to Questions 4A–4D.

Coding node	Frequency	Example
Not in role long enough	7	I have not worked as an AST long enough to complete this answer. (SURP153)
Kāhui Ako early stages	9	We are yet to really implement anything into a school - we are still at the gathering data stage. (SURP122)
Hard to generalise to answer question	5	It is hard to be qualitative when the above can be different for different schools. (SURP144)
Disagree is AST role	4	Mediating: when I read the description, I see that as a misconception of the role. This places AST as a PLD provider to come in and show the solution. It's a polish the gem mentality. Instead, adaptive change, involves an interrogation of evidence and asking the hard questions, there is no generic roll out solution, nor does anyone hold greater expertise than another. What makes an AST effective is the ability to think critically, use reflective questioning, to be self-aware and acknowledge the bias they hold and how this affects their interpretation and impact on students, colleagues, and place. Being a source of expertise does not necessarily sit ok with me, I found on the journey I learned a lot about myself and my practice. (SURP29)
Agree is AST role	3	Brokering is a core function of the role. (SURP139)
Question confusion	2	I am unclear what this question is asking. (SURP22)
Unfamiliar term:	1	Brokering First time I have seen this term. (SURP34)

4.6.1 Q4A Brokering Developmental Initiatives Within and Across Schools.

Tables 4.9-4.10 show that brokering (as defined in the question) was limited in its success for most of the participants. AST brokering with Kāhui Ako WSTs rated 51% ($n = 72$) for *extremely successful* and *very successful* combined totals compared to 29% ($n = 40$) *extremely successful* and *very successful* combined totals of other teachers who were not in an official Kāhui Ako role. These are interesting findings considering the expectation placed on the AST role by the Kāhui Ako policy is to work with colleagues on implementing the achievement challenge initiatives. The further comments related to brokering indicated senior-leaders of schools were attributed with contributing both positively and negatively towards the opportunity for ASTs to broker and that this success was contextual. These have been coded as challenges, opportunities, influencing factors and affirmation of success.

Table 4.9

Question 4A ASTs Brokering Success with Colleagues

Q4A out of 7 Brokering as a successful function of AST role.

BROKERING: managing how teachers translate the principles of school improvement into practice in their own classrooms to ensure that links within and across schools are strong and that opportunities for meaningful development among teachers are maximised.

Description	Extremely successful		Very successful		Somewhat successful		Not successful		Total
	#	%	#	%	#	%	#	%	
Kāhui Ako WST	21	15	51	36	58	41	10	7	140
Other teachers (who were not WSTs)	4	3	36	26	54	60	16	11	140

Table 4.10

Question 4A Combined Brokering Results

Description	Extremely successful / very successful	
	#	%
Kāhui Ako WST	72	51
Other teachers (who were not WSTs)	40	29

4.6.1.1 Brokering Challenges. The most frequent coding nodes related to brokering challenges nodes included role clarity, relationship building and the willingness of others to engage. Other challenges were out of the control of the participants in their roles including a global pandemic and the fixed-term nature of Kāhui Ako roles.

Table 4.11*Question 4A Thematic Analysis of “Any Further Comments on Brokering”*

Challenges to Brokering		
Coding node	Frequency	Example
Willingness to engage	9	I am finding this aspect the most frustrating. I assumed that because schools had agreed to be a part of the Kāhui Ako that they had agreed to participate with the achievement challenges. It is tricky to move school improvement into practice when schools aren't willing or interested in moving school improvement into practice and feel that they are okay doing their own thing. (SURP141)
WSTs' role clarity	6	WST teachers had very mixed messages about their role. I believe I improved brokering for some WST and schools but made negligible difference in others. (SURP88)
COVID-19 pandemic	5	I haven't really had the chance to get started as COVID-19 has impacted our AST role. (SURP87)
Understanding different dynamics and perspectives	3	It is sometimes difficult to translate what a school wants, what the AST wants and what the COL wants. There is a difficult balance to reach between what a school thinks they need, the politics involved and what you may need to compromise on to make the “significant” progress you may wish to achieve and how long that all takes. (SURP4)
Personnel stability:	3	Some of our WSTs have changed their roles which means that the momentum loses traction sometimes. (SURP103)

Six participants commented on instances of resistance they had experienced from their work colleagues including resistant colleagues ($n = 2$) resistant principals, ($n = 2$) and resistant senior-leaders ($n = 2$) in their AST role: “It depends on the flexibility of the principal. Lots of good ideas from staff, but if ideas were not supported by SLT, especially the principal, instead their vision was used, not much collaboration” (SURP94). Participants ($n = 5$) also reflected on the pressure of proving worth to others to gain accountability: “We had to really ‘prove our worth’ to others and work hard, ASTs and lead principal particularly” (SURP73).

4.6.1.2 Brokering Opportunities. Comments ($n=6$). included the opportunity to learn and apply new knowledge and skills: “Additional PD such as Teaching as Inquiry and coaching were great...we were able to practise this in our AST meetings as well as with the WSTs” (SURP23). Three participants also commented on the importance of brokering opportunities through contextual sharing of practice and networking:

The principles of school improvement were more successful in ongoing, regular focus groups where “other” teachers self-selected to join and regular meetings were held with opportunities to trial new ideas and reflect on these as a group at next meetings. The participants came from all levels of education and learned and contributed. (SURP88)

4.6.1.3 Brokering Positive Influencing Factors. Comments related to the lead principal ($n = 8$) and WST ($n=4$) roles having a positive influence on the AST role. This is demonstrated by one participant who expressed the key influencing factor to the success of brokering was due to the leadership of the lead principal:

The lead principal is open and transparent and shares everything with the COL team. He constantly asks us to be his checkpoint as he is a secondary principal and does not pretend to understand the nuances of primary schools. He constantly asks for feedback, and he takes on board what people have to say. He encourages his team to take his ideas back to their individual schools and then bring back feedback and questions and concerns. He is an extremely clever man. He had a sabbatical before he took over as lead principal. He focused on bringing about change through increased student agency and visible learning. He has buy-in from all the ASTs and WSTs, all the principals. Most ASTs and WSTs have got their staff on board too because his entire focus is on the children in front of us. (SURP39)

4.6.1.4 Affirmation that Participants were Successful at Brokering Two participants described evidence of feeling affirmed through impact and change related to brokering that they perceived they had been instrumental in influencing as an AST :“As with any teaching, once you have the students (in this case the WSTs) involved in teaching students (in this case the teachers), their own knowledge and teaching practice is enriched, and their leadership developed maximised and as ASTs we saw this in action” (SURP78).

4.6.2 Q4B Participation of Colleagues in Kāhui Ako

Tables 4.12-4.13 show the “participation: concept overall was contextual. The largest group, rated by participants with a combined *extremely successful* and *very successful* score, was the Kāhui Ako operational team at 85% ($n = 124$), followed by WSTs at 70% ($n = 99$), and senior-leaders at 52% ($n = 74$).

Table 4.12

Question 4B Participation Results

Q4B out of 7 Participation as a successful function of AST role.

PARTICIPATION:

- ensuring colleagues feel part of, and own, change and improvement,
- fostering collaborative ways of working with colleagues to shape school improvement efforts, and
- taking the lead in guiding colleagues toward a collective goal.

Description	Extremely successful		Very successful		Somewhat successful		Not successful		Total
	#	%	#	%	#	%	#	%	
Kāhui Ako operational team: other ASTs, Kāhui Ako leader(s)	67	46	57	39	19	13	3	2	146
Kāhui Ako WSTs	26	18	73	51	38	27	5	4	142
Other teachers (who were not WSTs)	8	6	47	33	73	51	14	10	142
Middle-leaders: team-leaders, curriculum-leaders, deans	13	9	42	30	65	46	21	15	141
Senior leader: principals, deputy, assistant, and associate principals	24	17	50	35	56	39	12	8	142

Table 4.13

Question 4B. Participation Combined Participation Results

Description	Extremely successful / very successful	
	#	%
Kāhui Ako operational team	124	85
Kāhui Ako WST	99	70
Other teachers	55	39
Middle-leaders	55	39
Senior-leaders	74	52

The further comments section supported the contextual variance that participation success depended on a range of factors including stakeholders' perceptions of the purpose and intent of the Kāhui Ako, especially that of senior-leaders. These have been coded as challenges, opportunities, influencing factors and affirmation of success and desirable skills or characteristics of an AST to make participation successful and are presented next.

4.6.2.1 Participation Challenges. Table 4.14 shows the most frequent coding nodes related to the perceived participation challenges. These themes included resistance from others in the Kāhui Ako, lack of role clarity, professional jealousy, and the effects of the -COVID-19 pandemic.

Table 4.14

Question 4B Thematic Analysis of “Any Further Comments on Participation”

Challenges to Participation and Negative Influencing Factors		
Coding node	Frequency	Example
Resistant senior-leaders	9	There was animosity from some senior-leaders, especially DPS who made it difficult for those in AST roles to utilise release time to work on Kāhui Ako goals, e.g., given classes to cover when there were no relievers, having to account for use of time, refusal to take part in Kāhui Ako theory of improvement meetings. This did filter down to some others on staff, as when we had no choice but to be out of school this had impacts on the rest of the teachers as no relievers were sought and people had to cover. (SURP29)
Willingness to engage:	8	Dependent on individual teachers, WSTs, SLTs and principals, and their investment in the work of the Kahui Ako, and specific PLD programmes. There has been a mixed response overall, in all honesty with a lot of energy and involvement from some schools, and not so much from others. (SURP95)
Resistant principals	6	The principals of each school dictate the participation. Some of them are totally not interested in the work of the Kahui and just want money and staffing from it. They make our job really hard because they are also the first to ask what we do in our roles as AST. (SURP59)
Resistant colleagues:	3	There is still some hesitation about COLs with the teachers who are not in the CoL roles and how they choose to engage. This is an area we are looking at how we can address this year. (SURP109)
COVID-19 pandemic	3	Sadly, our Teacher Only Day has been postponed because of COVID19. (SURP68)
Collective agreement on mahi to be done:	3	It very much depends on the agreement by all the principals of the goals and outcomes the COL wishes to achieve, including how much work is required for those who are not “paid” to do it. (SURP4)

Two participants commented on professional jealousy and the pressure related to proving their worth to others due to the remuneration and time allocation they received when employed in the role: “The COL does unfortunately create a bit of a divide and some resentment. It is not just the money (although that does play an important part) but the time component that other teachers may be jealous of” (SURP4). A further two participants made comments related to the ambiguity of the AST role and their perceived lack of place in the traditional school leadership hierarchy: “The opportunities vary hugely between schools, and sometimes your own school is the hardest to be effective in because you are not seen as a senior leader or a middle leader, so are out on the side, so who are you?” (SURP145). Two participants also relayed that, from their perspective, the lead principal was a negative influencing factor in their AST role:

So dysfunctional. This was heavily down to a very poor lead principal who was only interested in what she could gain personally from the COL. With the exception of one other AST, the operational group simply didn’t appear to care about meeting the Achievement Challenges at all and as we were told by the lead principal when we tried to actually put things in place to help teachers / students, she ‘wished we’d just shut up and take the money’. It was all about control for her, and so in no way was there participation allowed from ASTs who didn’t agree with her views. (SURP37)

4.6.2.2 Participation Positive Influencing Factors. Four participants spoke of the importance of their working relationship with the lead principal. This was even more evident with the participants ($n = 22$) who were the sole AST in their Kāhui Ako as demonstrated by this quote:

As the only AST I work with my lead principal all the time. We work together 4 afternoons a week. This includes planning, discussions, clarifying concepts and ideas, bouncing ideas off each other. He deals with the “big guns” which are the other school principals, and he presents to the boards of all the schools involved. Together he and I

work with the WSTs, and I am now in the process of visiting each school, meeting the principal, and asking them to show me all the amazing things that are already happening in their schools - our philosophy is to work with what is already happening, and then build on that. I am loving it. (SURP39)

Three participants also appreciated the positive influence of their fellow AST colleagues: “As ASTs in our KA work extremely well together we are often reflecting on how we work with each of our schools” (SURP89).

4.6.2.3 Participation Desirable Skills / Aptitude / Characteristics of an AST. Two participants stated to be successful in influencing participation as an AST, they needed to be relational: “Relationships and building trust across the schools in your Kahui Ako is key to the success of a Kahui Ako and the AST role” (SURP107).

4.6.2.4 Affirmation that Participants were Successful with Participation. Eleven participants referred to impact and change related to participation that they perceived they had been instrumental in influencing as an AST:

My role as the ECE rep has thus far continued to show a growth in the number of ECE’s being involved in our Kāhui Ako, participation continues to grow as I make endeavours to communicate with others...this is a process that will continue to take some time. As part of my role to continue to provide ECE / New Entrants network meetings in our area. I’ve been empowering staff at various levels to “show off” their schools / ECE highlights for others to learn and grow from. (SURP62)

Interestingly, in contrast, there was comment from another ECE participant whose response demonstrates a consistent theme that emerged throughout the findings in relation to how diverse and contextual the AST role is, how it is interpreted and enacted depending on the Kāhui Ako:

This is very difficult for me to answer as there are no ECE teachers in our Kāhui Ako in other formal roles, so my work is mixed between engaging in leadership through the

workstream and creating ECE engagement. My role and responsibilities are different from the “traditional” AST role but the criterion for leadership is the same. (SURP110)

4.6.2.5 Participant Participation Recommendations. Participants ($n = 9$) made recommendations to support participation success inclusiveness at different leadership levels is a requirement: “Our initial efforts were at WST and teacher level. We included school leaders as part of that group but on reflection have moved to develop specific actions to engage middle and senior leaders more” (SURP86).

4.6.3 Q4C Mediating

Tables 4.15–4.16 show the concept of “mediating” overall had been successful depending on the stakeholder group. The largest group, rated *extremely successful* and *very successful*, was the Kāhui Ako operational team at 84% ($n = 118$), followed by WSTs at 74% ($n = 103$), and senior-leaders at 55% ($n = 76$). Further mediation comments related to challenges, opportunities, positive influencing factors, participants’ perception of desirable skills, aptitudes, and characteristics. There were also numerous ($n = 10$) comments on whether the participants believed that mediating is or isn’t part of the AST role, with strong convictions both ways:

I absolutely see this as my role as an AST. Not that I believe that I need to know the answers to everything but that I can be the person that others can approach who can and will find the answer or help them to find the answer / solution that they need. (SURP141)

There were also comments ($n = 7$) about the use of the word *expert* in the definition and whether they saw themselves as one and / or believed it was necessary to be an expert to be an AST, for example: “I don’t feel it is a matter of you personally having expertise, it is more about your ability to source expertise and facilitate amongst peers” (SURP107). The relevance of expertise and the AST role will be discussed in Chapter 7.

Table 4.15*Question 4C Mediating Results*

Q4C out of 7 Mediating as a successful function of AST role.

MEDIATING: being a source of expertise and information (and drawing on additional expertise and external assistance) for the benefit of others.

Description	Extremely successful		Very successful		Somewhat successful		Not successful		Total
	#	%	#	%	#	%	#	%	
Kāhui Ako operational team	50	36	68	49	20	14	2	1	140
Kāhui Ako WSTs	30	22	73	53	34	24	2	1	139
Other teachers	12	9	54	39	66	47	8	6	140
Middle-leaders	9	6	45	32	69	50	16	12	139
Senior-leaders	21	15	55	40	50	36	13	9	139
Ākonga / students	12	9	54	39	50	36	23	17	139
Whānau including parent representative	7	5	33	24	61	44	38	27	139

Table 4.16*Question 4C Participation Combined Mediating Results*

	Extremely successful / very successful	
	#	%
Combined totals		
Kāhui Ako operational team	118	84
Kāhui Ako WSTs	103	74
Other teachers	66	47
Middle-leaders	54	39
Senior-leader	76	55
Ākonga / students	66	47
Whānau including parent representative with BOT	40	29

4.6.3.1 Mediating Challenges. The most frequent coding node ($n = 7$) for mediating challenges related to the tension between participants' initial perceptions of what the AST role was going to be and the reality once they were employed:

My skills were not used at all, apart from in my own school. I believe that the other AST and I made a difference in our own school, and this would have benefited students at our own school. But Col wide – it was a bit of a joke. (SURP43)

The COVID-19 pandemic restrictions were also mentioned in relation to stunting the mediating process: “Due to COVID we have been constrained to the scoping process so far this year and

have yet to make connections to others, very frustrating” (SURP124). The feeling of being stunted, for one participant, also related to frustrations and guilt about permissions granted by senior-leaders:

I personally was exposed to a lot of great PLD; however, it never went any further. I would actively participate, write pages of notes / findings afterwards, do the follow up readings etc, discuss it with the one AST who also wanted to make a difference....and that is where it would stop. The operational team of principals would not let it go any further. This is where the guilt came in - I was getting so much PLD and release time but was not making a difference to any teachers or students and others did not see what we did. (SURP37)

4.6.3.2 Mediating Opportunities. The most frequent coding node ($n = 5$) related to the opportunity to extend and create new networking opportunities: “More opportunities for whānau involvement with Kāhui Ako-related business would be beneficial for all involved” (SURP148). Two participants also saw the opportunity to share contextual practice: “My students have benefited from the research I have done focusing on metacognitive strategies. I have collected research for the focus group, shared my ideas and new resources with colleagues in my own school and the WSTs” (SURP113).

4.6.3.3 Mediating Positive Influencing Factors. Participants ($n = 4$) mentioned their gratitude for their AST colleagues: “Our AST team works very well together” (SURP124).

4.6.3.4 Mediation Desirable Skills / Aptitude / Characteristics of an AST. Four participants referred to the importance of communication skills: “I cannot stress the importance of open communication and transparency with all stakeholders to make this role successful” (SURP12). Two participants referred to the importance of being relational: “To mediate well it’s been so important to put time into developing relationships and encouraging staff to investigate change” (SURP92).

4.6.3.5 Affirmation that Participants were Successful at Mediating. Seven participants made comments about experiences related to mediating that were affirming of them in their role, however reluctantly, the significance of humility is discussed in Chapter 7:

This is a difficult one to answer without falling into the trap of, singing my own praises. I have grown into the role by leading and facilitating a PLD programme. I have worked very successfully with other members of the AST team, and with specific WSTs, SLTs, Principals and teachers in some of our schools, thereby influencing and helping to improve teachers' classroom practices. The impact my work has on students and whānau, for example, is mediated through that impact, and it is less transparent and consistent. (SURP95)

4.6.4 Q4D Building Professional Relationships

Tables 4.17–4.18 provide evidence that the concept of “relationships” overall were successful, once again depending on the stakeholder group. The largest group, rated *extremely successful* and *very successful*, was the Kāhui Ako operational team at 93% ($n = 132$), followed WSTs at 87% ($n = 123$), and senior-leaders at 79% ($n = 110$).

Table 4.17

Question 4D Relationships Results

Q4D out of 7 The extent “Relationships” are a successful function of the AST role.									
RELATIONSHIPS: forging respect and rapport with individuals, to underpin mutual learning.									
Description	Extremely successful		Very successful		Somewhat successful		Not successful		Total
	#	%	#	%	#	%	#	%	
Kāhui Ako operational team	93	65	39	27	8	6	2	1	142
Kāhui Ako WSTs	74	52	49	35	18	13	1	0.7	142
Other teachers	30	21	64	46	42	30	4	3	140
Middle-leaders	28	20	63	45	41	30	7	5	139
Senior-leaders	49	35	61	44	24	17	6	4	140
Ākonga/students	35	25	47	34	40	29	16	12	138
Whānau including parent representative	25	18	32	23	57	41	24	17	138

Table 4.18*Question 4D Relationships Combined Results*

Description	Extremely successful / very successful	
	#	%
Kāhui Ako operational team	132	93
Kāhui Ako WSTs	123	87
Other teachers	94	67
Middle-leaders	91	65
Senior-leaders	110	79
Ākonga/students	84	61
Whānau including parent representative (BOT)	57	41

Participants commented on the significance and importance of relationships, stating that forming relationships was a key focus for them in their role as an AST and that this was integral to their success in the Kāhui Ako. These relationships were contextual, complicated and they had been met, at times, with resistance and barriers including professional jealousy. This, in turn, impacted on the depth of the relationships they formed, ranging from surface level through to established and therefore meaningful and influential.

4.6.4.1 Relationship Challenges Participants commented on the relationship challenges they had with those they worked within their AST role, including principals ($n = 5$) and colleagues ($n = 2$): “We have had a strongly connected AST team however the principal leaders have not been united through our Kāhui Ako and this has been challenging and even contributed to members of the AST resigning” (SURP131). Participants ($n = 5$) also commented on the challenge of personnel instability to building and sustaining relationships in the Kāhui Ako:

Building relationships that move beyond the superficial takes a huge amount of time and this challenge is compounded by the constant shifting of staffing. In 3 short years, there have been so many personnel shifts that maintaining these relationships must be done carefully. From principal changes to sabbaticals, to changing school strategic focuses meaning the AST role changes...not to mention the AST personnel shifts. It is

like the wheel of a machine with every moving part changing every year! Not for the faint-hearted! (SURP52)

Other participants ($n = 4$) attributed professional jealousy as a challenge to relationships with others: “Relationships must be the most important aspect of a successful Kahui Ako. There has been a lot of professional jealousy, especially at the beginning with some even seeing the AST as quite a threat to their own leadership” (SURP73). One participant also commented that relationship challenges impacted role clarity with fellow ASTs as well:

It took our first AST group a while to gel and was not always successful due to not all needing to agree to the goals we were working on and who was doing what. Our second AST group is highly successful as appointments have been better placed to reflect teacher strengths. (SURP73)

4.6.4.2 Relationship Opportunities. There were participants ($n = 7$) who stated that networking was important to strengthening existing and creating new relationships. The example below relates to a specialist-tagged AST role:

As the AST responsible for learning support [LS] building relationships has been instrumental in preparation for the roll out of the LS Register. I have established close relationships with our outside support agencies. Relationships are the key to success, and I believe as a COL our success to date can be attributed to the relationships established with our Iwi, schools, and professionals we have met whilst in our roles. We continue to manaaki [support] and tautoko [advocate for] the need for additional resources to further develop our COL kaupapa [principles]. (SURP93)

One participant also commented on the importance of the AST opportunity to have dedicated release time to perform the role which in turn had strengthened their relationships with students due to being “refreshed” from time away: “Having the time to do the AST role I feel more refreshed from doing something different and time away from the classroom, and students benefit from what I am learning” (SURP113).

4.6.4.3 Relationship Positive Influencing Factors. Participants ($n = 6$) commented on their appreciation of their WST colleagues: “We built relationships with the WSTs in first term and worked on this throughout the year” (SURP72). Participants also commented on the significance of the leaders of the schools in the Kāhui Ako including other principals ($n = 2$), employing principal ($n = 1$), and lead principal ($n = 1$):

Building relationship with principals of the schools we are working in filters down into the staff. If they trust and respect us for our role as an AST, then staff are more likely to come on board. We have good success with building these relationships with leaders and we are welcomed into other school’s staff meetings with mutual respect. (SURP89)

Participants ($n = 3$) were also grateful for the relationships they had with fellow ASTs: “I am still getting to know the AST team, but it has been positive to date, we seem to work well together” (SURP113).

4.6.4.4 Relationship Desirable Skills / Aptitudes / Characteristics of an AST. Participants ($n = 12$) commented that the ability to build relationships was essential in the AST role: “Whakawhanaungatanga [process of establishing relationships] is paramount in this role! Building relationships within and across kura is vital to any Kahui Ako” (SURP47). One participant also commented on the importance of role modelling a learner mindset: “One key strategy is demonstrating to others that you are a learner yourself and that you can also find it hard. I would never ask anyone to do anything I was not prepared to do myself” (SURP12).

4.7 Q5 Professional Identity Development

Question 5 related to understanding how the participants’ experience as a AST influenced their professional identity. As described in this study’s conceptual framework for teacher-leader professional identity (pp. 70–71) participants were asked which phase best described how they perceived themselves as an AST at the time they completed the questionnaire. The vast majority saw themselves (and believed others saw them) as an AST with a combined 80% ($n = 109$) *describes me extremely well* and *describes me very well* score, as shown in Tables 4.19–4.20

Table 4.19*Question 5 Results, Professional Identity: Experimentation, Validation and Confirmation*

Q5 out of 7 – The professional identity phases: Experimentation, Validation, and Confirmation.

Rationale description	Describes me extremely well		Describes me very well		Describes me moderately well		Describes me slightly well		Does not describe me	
	#	%	#	%	#	%	#	%	#	%
Experimentation	9	7	13	10	19	14	22	17	70	53
Validation	15	11	39	29	21	16	32	24	27	20
Confirmation	51	38	58	43	14	10	8	6	5	4

Experimentation: I am trying on the role and deciding whether being an AST is a fit for me?**Validation:** I am confident that the AST role is a good fit for me, and I am now seeking validation from others. Do others think the AST is a fit for me?**Confirmation:** Others and I see me / or saw me as an AST.**Table 4.20***Question 5 Professional Identity Combined Results*

Rationale description	Extremely well / very well	
	#	%
Experimentation	22	17
Validation	54	40
Confirmation	109	80

The Further Comments on how the participants identified with or had identified themselves as an AST related to opportunities and challenges that either supported or hindered their professional identity development. As with Q4A–4D, there were a few comments ($n = 5$) about being new to the role and that the question was beyond their experience to date. For example, “I am still working out if my perception of what the job would entail matches the reality! At the moment it is vastly different” (SURP141). There were also comments ($n = 7$) from participants who felt uncomfortable with the idea of needing to seek any form of validation, and therefore the purpose of the question: “I am very confident in my role as an AST, yet I do not seek validation” (SURP104). As well as from a cultural perspective: “As a Māori, I am humble and don’t seek confirmation or glory of my mahi [work]. I let the work and

results before me to reflect the mahi accomplishments” (SURP93). This are important finding and will be discussed further in Chapter 7.

4.7.1 Professional Identity Development Challenges.

A few participants expressed feeling a strong sense of “place” as an AST in their Kāhui Ako. However, this was outnumbered by those participants ($n = 10$) who commented on the lack of a sense of place in the school hierarchy and questioned where they fit and, by being displaced, whether they were being effective in their roles:

The struggle for me is whereas an AST, I fit within my own school- neither included in any middle-leadership discussion or information nor in senior-leadership. This means that the role is on the side- I feel like an annoying gnat at times. (SURP145)

Participants ($n = 4$) expressed this was compounded by a sense of accountability to prove their worth in their AST role, especially compared to other leadership roles’ remuneration and release time allowances:

There is a sense that there is pressure to demonstrate what I am doing with my time and extra funding (in my own “base” school). Other teachers/leaders see my timetable and allowance and there is a sense of inequity felt that someone like a dean gets the same (or less) time and less allowance for their role. (SURP52)

Participants ($n = 3$) commented on the impact of the COVID-19 pandemic on being able to perform the AST role and therefore develop a sense of the role: “COVID-19 has interrupted the plans we had in place to go out and meet with tūmuaki [principal]” (SURP123). One participant also commented on the difficulty of resistant senior-leaders’ opinions towards Kāhui Ako and how that was not only impacting their effectiveness in their role but also their employment future:

Our DP is so openly opposed to our Kāhui Ako and this constantly limits my impact and my voice at the table in our kura. I have spoken to our principal who currently leads our Kāhui Ako, but he supports her decisions. If I reapply for the AST at the end of this

year, unfortunately I will look for employment in another kura doing this role.

(SURP131)

Another participant also commented on the need to navigate the challenges of effective collaboration:

I am navigating the challenges that affect effective collaboration among school like workload and breaking down the barriers of working in one's own bubble and believing that we as a school have the best way and don't necessarily want to work alongside others that stand in the way of what I believe true collaboration in a Kahui Ako could/should be. (SURP105)

One participant commented on the conflict they were feeling between the needs of their employing school and the wider Kāhui Ako due to the challenge of personnel instability and them reapplying for the AST role: "My own school had 4 principals in 15 months, and much of my focus had to be within my own school during that time, as my experience and support was needed very much at home" (SURP65).

4.7.2 Professional Identity Development Negative Experiences and Lack of Affirmation

A few ($n = 5$) ASTs' experiences had negatively impacted on their professional identity and self-confidence:

I was excited to get the role, as I understood the role to be throughout the application process. However, the role turned out to be vastly different. I was terribly unhappy and disillusioned by leadership in education and I was on the verge of leaving education. (SURP43)

One participant even provided an example of resigning from the role due to a lack of self-efficacy in their AST role: "I am not an AST anymore as it was not a good fit with my role in my own school and I felt I was not doing a good enough job in the AST role" (SURP65).

4.7.3 Professional Identity Development Positive Experiences and Success Affirmation

Participants ($n = 6$) commented on how they were enjoying the AST role as a good fit for them: “I already knew when I took on this AST role that it was would be a good fit. I have a passion and desire to fulfil the needs of our community, whānau and students.” (SURP67). For other participants ($n = 5$), that affirmation of success came from the impact and change they had observed due to their effectiveness in the AST role: “Having led some bodies of work at primary schools in our Kāhui Ako, has led to confirmation that they see me as an AST. Having the principals approach me about the work they would look like in their place, has further confirmed this” (SURP83). The reappointment process was also an affirmation of success for some participants ($n = 3$): “Confirmation has also come through the Kahui Ako asking me to consider reapplying for another two years” (SURP130).

4.8 Q6. Respect, Value, Recognition, and Reward

Question 6 related to understanding the participants’ experience of being respected, valued, recognised, and rewarded as an AST. There were comments ($n = 7$) that related to the use of the word *rewarded* and whether that included remuneration. “There is no need for reward - as we are paid for the job and that is what is expected” (SURP145). Also a few comments ($n = 4$) related to a preference for a separation between the principal and senior-leaders as they had varying experiences between them, for example: “My within school experiences are clearly split. The principal respects, values and recognises my work. The DPs do not. For me this question should be split, as there is a clear difference in the answers.” (SURP63). There was also a poignant and valid comment that the language of the question was only reflective of the schooling sector and not inclusive of ASTs from the early learning sector:

I’ve just taken the parts that refer to the school principals as being my own Head Teacher. This is a true reflection of me constantly having to translate school systems and terminology to try and find the nearest fit with ECE. Hopefully in a few years’ time when there’s more formal ECE involvement, the KA systems and structure will

integrate ways of operating, language, and systems inclusive and reflective of ECE, but you have to start somewhere! (SURP110)

The vast majority of the participants felt respected, valued, recognised, and rewarded, as shown in Tables 4.21-4.22. The further comments also provided some positive examples. However, overall, comments more frequently noted the challenges that impacted their effectiveness in their AST role and negatively influenced their professional identity development.

Table 4.21

Question 6 Results: Respected, Valued and Recognised as an AST.

Statement	Describes experience extremely well		Describes experience well		Describes experience moderately well		Describes experience slightly well		Does not describe experience		Total
	#	%	#	%	#	%	#	%	#	%	#
RESPECTED by colleagues.	50	36	53	38	25	18	9	6	4	3	141
RESPECTED by OWN principal and senior-leaders in school.	76	54	28	20	18	13	11	8	8	5	141
RESPECTED by the OTHER principals and senior-leaders.	49	35	61	43	25	18	3	2	3	2	141
VALUED by colleagues.	46	33	43	31	35	25	12	9	5	4	141
VALUED by OWN principal and senior-leaders in school.	76	54	26	18	17	12	14	10	8	6	141
VALUED by the OTHER principals and senior-leaders.	43	31	62	44	27	19	6	4	3	2	141
RECOGNISED and REWARDED by OWN principal and senior-leaders in school.	43	31	39	28	25	18	16	11	17	12	140
RECOGNISED and REWARDED by the OTHER principals and senior-leaders.	31	22	49	35	36	26	13	9	10	7	139

Table 4.22

Question 6 Combined Results: Respected, Valued and Recognised as an AST.

Statement	Extremely well / very well	
	#	%
RESPECTED by colleagues.	103	73
RESPECTED by OWN principal and senior-leaders in school.	104	73
RESPECTED by OTHER principals and senior-leaders.	110	78
VALUED by colleagues.	89	63
VALUED by OWN principal and senior-leaders in school.	102	72
VALUED by the OTHER principals and senior-leaders.	105	74
RECOGNISED and REWARDED by OWN principal and senior-leaders in school.	82	58
RECOGNISED and REWARDED by the OTHER principals and senior-leaders	80	57

4.8.1 Respect, Value, Recognition, and Reward Opportunities.

There were comments ($n = 8$) that suggested that the participant's experience of being respected, valued, and recognised may have come from the credibility they brought to the role from previous and co-current roles and not necessarily from their performance as an AST, for example: "Most of the respect, value and reward I have had in my tenure has been because of previous roles and community connections, not as a result of the Kahui Ako and the work we have done or me being in the AST role" (SURP91). Positive influencing factors related to both the employing principal ($n = 2$) and lead principal ($n = 1$):

I think that if I had any other lead principal, I would not be feeling as valued as I do. He had to do a lot of "damage control" after the previous 2 years of our COL when people didn't see much happening and TAIs [teaching as inquiry] turned into 10-page essays and a burden. My lead principal did a lot of work to change this, and he has always spoken about me in the best way possible. He has my back all the time. (SURP39)

4.8.2 Respect, Value, Recognition, and Reward Challenges

Participants commented that for them to be valued in their AST role, the members of the Kāhui Ako need to be committed ($n = 2$) and engage in collaboration ($n = 2$):

The leaders at my own school constantly resist the need for change or reflection, however, other schools are very open. My school appears to be open and will have conversations etc, but when change is pushed for the door gets closed and we seem to be powerless to persuade them otherwise. (SURP116)

For some participants, this lack of willingness to engage extended to outright resistance behaviour from within the Kāhui Ako from both colleagues ($n = 3$) and senior-leaders ($n = 2$): “In my own place, our SLT was 50/50. However, the 50% that were unsupportive made it an unpleasant and frustrating time” (SURP29). “Many ‘other’ teachers do not value or respect Kahui leaders and make uninformed comments and engage in passive aggressive behaviour” (SURP88).

Negative behaviour also extended to professional jealousy ($n = 1$): “The feedback I get from colleagues is that I’m getting well-remunerated with time and money for (perceived) little evidence of work” (SURP80). Participants ($n = 2$) also commented on the challenge of accountability and the pressure of proving their worth to others: “I was questioned by my principal about my “part-time” employment and equity of pay with others in the school. Interestingly I have not felt the same negativity in any of the other schools in our community” (SURP73). For other participants ($n = 5$), their main challenge to being respected, valued, and recognised related to the ambiguity of the AST role:

There is a real lack of understanding of the role beyond principals and senior-leaders. Even the WST do not fully have a grasp on what the AST role entails. I suspect this is because it looks different in different spaces. Additionally, a large part of the role is unseen – a lot of new school initiatives are presented by senior-leaders and the work of the community is not often mentioned in these initiatives. Therefore, the AST role can be very invisible outside of principals and SLT as it is the “glue” where influence is forged and enacted. (SURP52)

For another participant, their frustration came from a perceived lack of consultation and collaboration with the AST team: “We were not always included in decision making but were expected to drive and motivate others in what was decided. Very frustrating” (SURP46). Other participants ($n = 3$) felt undervalued due to being expected to not only take on the AST role but also to continue with all their other leadership and teacher responsibilities:

The AST role has come with inequity and relativity of pay concerns. Principals have strived to retain a differentiation of remuneration between their senior staff and the AST role. The AST role allowance recognition is for the AST role, however, I am also expected to effectively retain a team leader position with full leadership responsibilities and at least 3 days per week in a classroom, while still being responsible for report writing, planning, etc yet my management units were removed because of the AST allowance. This did make me feel undervalued. (SURP78)

4.8.3 Respect, Value, Recognition, and Reward Negative and Positive Influencing Factors

The significance of the Kāhui Ako principal stewardship group (employing principal, other principals, and lead principal) in a Kāhui Ako had an influencing factor equally negatively ($n = 3$) and positively ($n = 3$) on the participants’ experience as an AST. One participant did express that they were not affirmed in their role which negatively impacted their professional identity development:

It was a humiliating experience. I was mis-represented by the lead principal and set up to look like I “thought I was above my station.” After the big fancy application and interview process – in which the principals selected us – I feel we were left to work it out and fend for ourselves in “their world” I felt very much on the outside - the enemy. A huge knock to my confidence and I still cringe thinking about it all. (SURP38)

Six participants expressed they had experienced affirmation through feedback and praise. Four participants stressed their perception that an important desirable characteristic to be successful as an AST was to have credibility as a teacher and leader.

4.9 Q7A. Ongoing Influences

Question 7 related to gaining an understanding of the ongoing influences that made a significant impact on how participants were able to perform in their role as an AST. The definition of ongoing influences for this study relates to both positive and negative factors that have a continued presence in one's professional life and do not manifest as a single event. The positive ongoing influences described in this section included collaboration, connections, expertise and leadership support and the gift of resourcing, especially time allocated to the AST role. Some of the more negatively perceived influences included workload backfill and job-share difficulties including aligning release time, individuals who were perceived as "blockers" and the lack of clarity of their AST positioning in relation to colleagues roles.

4.9.1 Challenges that were a Negative Influencing Factor.

As much as participants appreciated the dedicated resourcing aligning release time to come together was the highest scoring challenge ($n = 10$) for participants: "The ability to find amenable time to work with people e.g., other ASTs do not have the same days as you, WSTs' days can change, and it is difficult to get times to match up to and therefore means you cannot be most effective in the role" (SURP55).

This challenge was followed by the disruption of key personnel changes ($n = 9$): "Ongoing recruitment and staff changes has slowed down the process whilst we built relationships and took the time to realign vision, values and strategic directions" (SURP27).

Once again, the lack of willingness of those in the Kāhui Ako to commit, engage and collaborate ($n = 8$) was problematic as was achieving collective agreement on the mahi ($n = 3$): "The principal group within my Kāhui Ako did not have a shared vision and what we should be doing, therefore we were often battling to get into schools to work on initiatives" (SURP51).

For some participants ($n = 6$), the challenges they experienced were due to the reality of implementing a Kāhui Ako compared to the intention of the policy: "As much as the theory about how communities of learning effectiveness are well known, the large nature of our Kāhui

Ako makes it difficult in practice” (SURP150). The perceived resistance of principals ($n = 7$) and other senior-leaders ($n = 2$) was also impactful as an ongoing influence for participants: “I have felt constantly blocked by my own senior-leadership team. This has been very frustrating, and I’m currently considering whether or not I want to continue in the role because of this” (SURP10). As well as ambiguity ($n = 7$) of the AST role’s positioning compared to other leadership roles: “Finding your place is difficult as schools have a strict hierarchy, even though we are not DPs some see us as DP type roles, but others see us as sitting outside almost like a ministry role – this made it difficult at first” (SURP112).

The hybrid nature of the AST role and the balance of other responsibilities ($n = 7$), as well as the need to often job share with others ($n = 4$), were an ongoing influence for some participants: “I have a self-awareness of what my role involves as a SENCO [special education needs coordinator], and that releasing me is hard as there are so few people with the skill set or inclination to replace me” (SURP136). Additionally, the pressure of proving worth to others ($n = 4$): “Teachers from other schools are not sure what we get paid for and have release for, expect to see them every week” (SURP7). A few participants ($n = 3$) experienced a lack of leadership guidance and support: “There has been no leadership guidance or training about the role, making it difficult to know what I am meant to do! I have needed to make my own role; I know other ASTs have also found this a challenge” (SURP9). Participants ($n = 4$) also commented on how contextual the AST role was, depending on both their Kāhui Ako and within the Kāhui Ako for the different ASTs: “The model of having responsibility for certain schools rather than projects within all schools has been problematic and seems to differ from what other ASTs do in their Kāhui Ako” (SURP16). The Kāhui Ako context also included, for one participant (SURP94) the challenge of needing to travel to rural schools and getting release time for sole charge schools’ support.

4.9.2 Negative Influencing Factors.

Participants ($n = 4$) stated that their employing principal was a negative influencing factor: “My own principal I am not sure of his understanding of our role, and he manipulates the collective decisions to ensure what he wants is done. He will be supportive in one breath and not supportive in the next” (SURP49). Participants ($n = 6$) also stated other principals who were not their employing principal and senior-leaders were also a barrier. “I am always ‘fighting’ against our senior-leaders in order to get the relief needed in order to fulfil my role” (SURP26). and the lead principal ($n = 2$) were a negative influencing factor:

My relationship with my lead principal has been difficult. In my own school, I make fairly major decisions, have a high level of responsibility, and have a collaborative and supportive relationship with my principal. I have found it difficult to achieve this same level of relational trust and autonomy. There is a considerable degree of local politics between schools that has exacerbated the problem. I have found it extremely hard to take any concrete actions towards the Achievement Challenges. (SURP91)

Overall, the participants commented positively about PLD advisors and the lead principal. However, there were participants ($n = 2$), who stated their PLD advisor was a negative influencing factor: “While the delivery of PD by outside providers has been valued, I feel the providers have had too much influence in shaping the direction of our Kāhui Ako. This has resulted in less agency and flexibility in this role than I would prefer” (SURP114).

4.9.3 Opportunities that were a Positive Influencing Factor.

The opportunity of dedicated release time to perform the AST role was significant for participants ($n = 11$):

Being funded one day a week and making this day the same as the weekly AST meetings, monthly principal / early learning centre lead and WST meetings makes me feel not only included as an ECE representative but also allows me to take in the full work of the Kāhui Ako and kept in the loop first hand. (SURP62)

The additional PLD opportunities and growth due to being in a Kāhui Ako was a positive influence for some participants ($n = 8$): “Using expertise to support the Big Picture Ideas and being provided with Professional learning – how to be an effective leader of learning has been beneficial” (SURP33). Participants ($n = 8$) also appreciated the opportunity to build on existing and create new networks: “Opportunities to engage with outside agencies and experts to reflect on the role” (SURP44). This networking also included the opportunity for contextual sharing of practice ($n = 7$), which also led to gaining insights from wider perspectives ($n = 3$): “I have felt refreshed by being able to see good practice. I feel lucky to have made connections in the community and value the time spent seeing into primary schools and sharing that with others” (SURP69).

4.9.4 Positive Influencing Factors.

Ongoing positive influencing factors related to people and included fellow ASTs, lead principals, and SLTs. The highest-ranking positive influencing factor was the other ASTs ($n = 30$) whom the participants worked alongside: “Fantastic support from my other ASTs as I have been new to the role. There are two ASTs I work with, and both have given huge amounts of support, even though we all teach at different schools” (SURP102). This was followed by lead principal(s) ($n = 23$), employing principal ($n = 12$) and other principals and senior-leaders ($n = 12$). Participants ($n = 10$) also commented on the positive influencing factor of the PLD advisor who worked with the Kāhui Ako:

Another significant positive impact was the relationship with our Kahui expert partner. She valued what we were trying to do and worked with us collectively and as individuals to improve our knowledge and understanding of working collaboratively. I found this beneficial to my confidence in my role as an AST and I still find myself frequently referring back to the discussions and resources provided. (SURP59)

Colleagues in other roles ($n=7$) were noted as another positive relationship: “Working with SENCO, Ministry Manager and RTLB in our Kahui Ako – fantastic feedback, supportive

environment, working collaboratively” (SURP56). Participants ($n = 5$) were additionally grateful for the positive influencing factor of the WSTs they worked with: “My WST team is fantastic. They are from a range of departments and are stunning practitioners who have grown in expertise during this adventure” (SURP92). Two participants also commented on the positive influencing factor of iwi, whānau and hapū: “I appreciated the support of iwi, whanau and hapū. Personal relationships were key” (SURP86).

4.9.5 Affirmation that Participants were Successful in their AST Role.

Apart from two participants commented that they did not feel affirmed in the AST role: “I am surprised at how slowly the cogs turn and the large amount of work that goes on behind the scenes but is not acknowledged. I don’t feel appreciated or “seen” in my role” (SURP118). More participants experienced affirmation of their success through feedback and validation ($n = 7$), through seeing the impact and change due to being in their AST role ($n = 5$) and personal growth in confidence ($n = 1$).

4.9.6 Further Comments: Desirable Skills /Aptitudes/ Characteristics of an AST.

The three top-scoring key desirable skills, aptitudes, and characteristics to be successful in the AST role that were captured in the ongoing influences section included being collaborative ($n = 5$), an effective communicator ($n = 4$), relational ($n = 3$) and credible ($n = 3$). Followed by being knowledgeable ($n = 2$), adaptable ($n = 1$) and a strategic thinker ($n = 1$).

4.10 Q7B. Critical Incidents or Key Events.

This question allowed participants the opportunity to reflect on critical incidents and / or key events (either positive or negative) that made a significant impact on how they were able to perform in their role as an AST. Critical incidents included COVID-19, personnel changes, the introduction of another government initiative role and Kāhui Ako hui (gatherings).

Table 4.23*Question 7B Thematic Analysis of Critical Incidents or Key Events*

Key events and critical incidents that made a significant impact on AST role		
Coding node	Frequency	Example
Key events and Kāhui Ako hui	13	I booked all principals and leaders of Māori in our area to a hui at the marae where we created a strategy for te ao Māori in our area. This helped build buy-in and with the support and backing of our marae and local kaumatua [elders], our mahi gained the mana [prestige] and direction it needed at a leadership level. Everyone had a voice, and everyone had a stake in seeing the strategy succeed, not only in their own kura but as a part of our Kāhui (SURP75).
COVID 19	12	COVID19 Lock down! Working remotely, cancelling events, and thinking of new ways to help support schools (SURP127).
Combined PLD	10	Having a professional development course that we all as a Kāhui Ako attend, has built our community together (SURP20).
Foundational functionality critical changes	8	Changes in structure of how the AST role should look in our Kahui Ako. These changes were positive i.e., less structured in terms of having to be in a school for x number of hours per week and giving schools more “say” in how they would like to use AST and WST time to enable them to reach their strategic goals (SURP35).
Combined teacher only days (TOD)	7	We have had two Kahui Ako wide TODs that have helped with our credibility (SURP92.)
Kāhui Ako workshops	6	Hosting workshops have been key events for us. These have created important connections within our Kahui Ako and with other Kahui Ako (SURP17).
Combined celebration hui	4	“The Cultural Festival that I organised for our 12 schools. This was an event that was identified as ‘missing’ from our Kāhui, and the positive feedback was fantastic as it affirmed the work of us as ASTs. I felt like I had directly had an impact on the students in a positive way and shown teachers and staff what possibilities are out there when we work together” (SURP59).
Combined student engagement	3	Our Year 6 Children visited the high school to participate in Science, Māori and PE lessons twice a year in 2019 once in 2020 (SURP7).
Traumatic incidents	2	Kahui Ako traumatic events (x4) in a short space of time, had to change time frames on different activities (SURP64).
Award/grant	1	Winning a TLRI [Teaching and Learning Research Initiative] funded project along with support from a university was a key event to support us (SURP18).

It is important to note that due to the COVID-19 pandemic the government’s nationwide response with the participants unexpectedly “locked down” in their homes was mentioned throughout the questionnaire in different places. The pandemic could be coded as an ongoing negative influence ($n = 5$); however, it was also mentioned as a challenge ($n = 5$) and as a critical incident / key event ($n = 12$).

Foundational functional changes such as change of personnel including in the ASTs' own organisation and the wider Kāhui Ako made a significant impact on their experience, especially if the change was a Kāhui Ako leadership position. The introduction of learning support coordinators (LSC)⁶ and understanding how these people would impact the Kāhui Ako roles in relation to role clarity, especially for those AST in specialised positions, was another significant critical incident as demonstrated by this quote: "The appointment of LSCs as I was looking after learning support, so this has changed my role and what I do" (SURP112).

Different types of hui (gatherings) were noted as being influential and making an impact especially in relation to enabling and validating their AST role. These ranged from big national PLD events to more localised and smaller affairs such as Kāhui Ako stewardship meetings, AST and WST meetings, and specialised group meetings, for example learning support staff and leaders of Māori. This is summarised succinctly in this quote:

COL Seminars, TOD and BOT Huis have been the consistent and significant events that have provided a platform for me to "share and present" the wins and losses of the Term. As a result, this also becomes an accountable way for me to lead in the COL a collaborative strategy with my amazing WST. (SURP60)

There was one participant who disagreed with the effectiveness of combined teacher only days. "Negative: Kahui Ako wide TODs that were not collaboratively decided upon and distracted from the kaupapa" (SURP29). There were also other comments in this section that have been coded as opportunities, challenges, positive and negative influences, and desirable characteristics for an AST to be successful in their role.

⁶ LSCs were registered teachers allocated to clusters of schools. "The LSC is an additional, full-time, dedicated role working to ensure all learners including those with disabilities, neurodiversity, and behavioural issues, and those who are gifted, get the help they need" (MOE, 2023e, p. 5). "The tranche of LSCs in 2020 was limited to 623 nationally, allocated on a ratio of 1:500 enrolled students in a cluster" (p. 12). In August 2019, 623 full-time permanent LSC roles were allocated to 1,052 schools in 124 clusters of schools, kura and early learning services me ngā kōhanga reo (MOE, 2023e).

4.10.1 Critical Incidents / Key Events Perceived as Opportunities.

The top three opportunities due to a critical incident or key event stated by participants included firstly being grateful for the opportunity of additional PLD opportunities and growth due to Kāhui Ako ($n = 15$): “The ability to attend conferences /hui / PLD that wouldn’t normally be offered to me in a teaching role including PLD with other Kāhui Ako ASTs and lead principals” (SURP84). Secondly, the opportunity to network by both building on existing and creating new connections ($n = 8$): “Networking, going into other schools, trying to make a difference” (SURP85). Thirdly, the opportunity of gaining insights from wider perspectives ($n = 6$): “Learning how to streamline our local education from early childhood through to Year 13 and beyond. Growing knowledge of how each of us sees ourselves as teachers, then shared for the betterment of students and wider communities” (SURP41).

The other opportunities included dedicated release time and a non-teaching space to assist them in their AST role ($n = 4$): “Time allocation and a space to do my Kāhui Ako work is a key influence on how much I can get done (i.e., not a kindergarten office which is the only adult space for me onsite and serves many purposes)” (SURP110). As well as the ability to share data ($n = 3$) and contextual sharing of practice ($n = 2$).

4.10.2 Critical Incidents / Key Events Perceived as Challenges.

Participants ($n = 9$) found the instability of personnel a challenging influence on their success in the AST role: “The lead principal resigned, and it took 3 terms to reappoint, and I was in limbo for all that time” (SURP125). Participants ($n = 5$) also stated that resistant principals were a challenge: “Our Kāhui Ako management team has been interesting at times. All Principals are at varying stages of their careers and are “interesting” at times and can be resistant to ideas if they don’t see it benefiting them personally” (SURP45). Participants ($n = 5$) were also challenged by the hybrid model of the AST role and their other teacher responsibilities:

I have been given all my previous responsibilities and more at my school: form teacher, assembly supervision, relief, blended classes - without considering the workload of my

AST role – makes me feel the role is not valued. The workload is unsustainable. It took me 6 weeks to have the form class taken off me. (SURP124)

Participants ($n = 4$) commented on the challenge of there not being a collective agreement on mahi to be done: “The principals’ perception about what we should be doing was quite difficult with 13 schools and 13 different principal opinions. With so many voices needed to be heard made it quite difficult to get moving with ideas” (SURP111). Additionally, participants ($n = 3$) were challenged by the lack of leadership guidance and support: “We had an ineffective lead principal who was unable to drive any initiatives with his colleagues. The lead principal also stopped working with the AST team after 18 months, leaving us to struggle on our own” (SURP51). Resistant colleagues ($n = 3$) were seen as a challenge: “When I initially began the role, I had to hear colleagues were unsure on what my role was and were not very supportive” (SURP99). Including resistant WSTs ($n = 2$): “We had two quite opinionated WST last year (when they were together). One is not a WST now and I must admit it is a more pleasant atmosphere on the team” (SURP45). As well as a perceived professional jealousy ($n = 2$) as a blocker to access of colleagues: “It has been difficult to get the time of key people in schools to be released to work with us. Trying to overcome the “jealousy” of those who are paid to be involved, and those that are involved who are not paid” (SURP4). Release time and timetabling ($n = 2$) was stated to be a challenge: “High school timetabling and fitting my classroom teaching around my role. Having to “pay back” relief when courses, meetings etc that I am required to attend do not fit the 6-day cycle of the school and are taken on non-COL days” (SURP6).

A lack of willingness to commit, engage and collaborate ($n = 2$) was viewed as challenging: “Lack of input/ feedback from schools to help inform decision making (time is precious!)” (SURP79). There were also comments related to the challenges of role clarification with other ASTs ($n = 1$), and colleagues ($n = 1$), proving worth to others ($n = 1$), aligning release time for the opportunity to come together with other ASTs ($n = 1$) and lastly the conceptual idea of Kāhui Ako compared to the reality in action ($n = 1$) for example: “Individual

schools having different communities, Boards of Trustees, systems, policies and hierarchies which has made it difficult to actually bring the idea of a Kāhui Ako alignment into reality”(SURP27).

4.10.3 Positive and Negative Influencing Factors of Critical Events / Incidents.

Both positive and negative influencing factors that related to critical incidents / key events were identified by participants. Table 4.24 provides an overview of these factors. Overall, positive outweighed negative influencing factors. Iwi and hapū ($n = 1$) and MOE advisor ($n = 1$) were also seen as positive influencing factors.

Table 4.24

Question 7B Positive and Negative influencing factors of Critical Events / Incidents

Positive and Negative Influencing factors of Critical Events / Incidents		
Coding node	Frequency	Example
Positive: Lead principal	8	Support from lead principal in facilitating challenging conversations when needed (SURP97).
Negative: Lead principal	3	There have been occasions where I have felt that my ideas and contributions have been publicly shut down by one of my lead principals. I contribute less and less to our meetings (SURP140).
Positive: other principals and senior- leaders	8	Working directly with principals and having support and a high-trust relationship, allows me to get the job done. This has meant that there can be full staff collaboration, which ultimately means that change can happen in the classrooms (SURP31).
Negative: other principals and senior- leaders	3	When a WST isn't receiving support from their SLT, they struggle to do their job. This entails not having release time they're entitled to, not being able to attend PD seminars, nor access funds to facilitate the work they need to. Barrier after barrier is put in their way and in one this has seen the WST role change hands three times in 3 years. In the long run in that specific school, the WST has to start from the beginning, and nothing has changed significantly for struggling students (SURP95).
Positive: other ASTs	6	Working alongside another AST was great as we could share ideas and as a result, we brought true TAI [Teaching as Inquiry] into our own school and also revamped the appraisal system etc. I was proud of what we achieved (SURP43).
Positive PLD advisor	4	Our expert partner and our PLD Facilitators (SURP28).

Positive and Negative Influencing factors of Critical Events / Incidents		
Coding node	Frequency	Example
Negative: PLD advisor	1	Our expert partner was only there as the lead principal's main cheerleader and was complicit rather than a neutral support in the bad behaviour. I considered leaving education (SURP43).
Positive: Employing principal	2	Having the trust placed in me from my own principal has made all the difference. It has given me confidence to conduct myself in this role and it has been exciting as a result (SURP115).
Negative: Employing principal	1	A negative incident is when I asked my own Principal if one of the AST team could come to our PLD on wellbeing. His immediate response was "NO" and said "I don't want outsiders coming in." This was disappointing but also enlightening. Despite the clear reluctance and lack of understanding of the Kahui, I am now clear about where my own school stands on the involvement of the Kahui, so now I can just get on with being an AST in the best way that I can. Work with the willing (SURP59).

4.10.4 Critical Incidents / Key Events Perceived as Affirmation of Success.

Most of the comments related to critical incidents / key events being perceived as an opportunity to affirm participants' success in their AST role. This included the opportunity to make an impact and influence change ($n = 15$) and receiving feedback and validation ($n = 4$): "Presentation of my inquiry which along with the other AST's contributed to the direction of PLD and delivery for the Kāhui Ako for the following year" (SURP120). The NANP reappointment process was affirming for a few participants ($n = 3$): "My reinterview had a significant impact on how I feel about my role. The interview panel was extremely positive about what I had achieved to date" (SURP99). A few participants ($n = 3$) commented on how personal reflection at times of critical events was important to overcome any negative experience so that it did not impact their affirmation of success in their AST role further desirable skills, aptitudes, and characters to handle critical incidents and key events is presented next.

4.10.5 Comments: Desirable Skills / Aptitudes / Characteristics of an AST.

Table 4.25 is a summary of further comments from Q7A and Q7B according to the participants.

Eleven key characteristics are identified, covering intra- as well as interpersonal characteristics.

Table 4.25

Question 7B Desirable Skills / Aptitudes / Characteristics of an AST

Desirable Skills / Aptitudes / Characteristics of an AST According to Participants		
Coding node	Frequency	Example
Credibility	9	Great relationships with the teachers from all of our Kāhui Ako. I wasn't a new face in our community, and I knew many of them already due to the work I had already been doing (SURP48).
Communicative	6	Need to be apt at using a platform to enable regular communication and need to have regular meetings (SURP33).
Collaborative	6	Working collaboratively with others to inform change (SURP66).
Highly organised, time management, self-directed:	5	There was no template for the work to be done so having the freedom and motivation to work to the needs of my schools was a bonus (SURP117).
Strategic thinking:	4	As an AST team we needed to be able to collect / analyse feedback from the principals and reflect on our next actions going forward and put that into a strategic plan (SURP98).
Relational	4	After 2 years in the role in some schools I am only now becoming involved in a real way. Building trust takes a significant amount of time and effort, but this is crucial for buy into any change (SURP21).
Knowledgeable / research backed	3	Already having a master's in educational leadership – I think everyone should either have done this or be engaged with postgraduate/ master's further education (SURP139).
Building capacity in others	2	Building WST leadership capacity on how to run workshops and presentations themselves and how we can start together to make a difference within our own schools (SURP3).
Letting go	2	Some schools and teachers are not ready or willing to enter discussions about change. Accepting this and working where I can have the greatest impact has been an important learning (SURP21).
Resilience	1	You need to develop thick skin and take comments on the chin (SURP107).

Desirable Skills / Aptitudes / Characteristics of an AST According to Participants		
Coding node	Frequency	Example
Adaptability	1	We have had to modify and adapt our ideas and ways of working to suit people, contexts, and situations – being flexible is vitally important (SURP58).

4.11 General Comments: Participant Personal Experience of the AST role

This section provides the results from participants who provided further comments at the conclusion of the questionnaire, regarding their personal experience of being an AST.

4.11.1 Personal Experience of the AST role.

The general experience comments ($n = 110$) were inclusive of both positive and negative experiences in the one comment. Participants stated how much they had a positive experience in carrying out the role, were grateful for the opportunity, felt a sense of privilege and understood the purpose and potential of the role. However, at the same time participants also described dealing with frustrations, uncertainties, ambiguity, and suspicion from other colleagues as they carried out the role. This quote exemplifies this contradiction:

I feel very privileged to be an AST, but I also feel a lot of pressure. There is a general suspicion of the role with fellow teachers, and I sometimes feel that I need to spend a lot of time justifying the role to others. The position carries with it great benefits in terms of classroom release and money, but I feel that it also carries with it very little mana [prestige]. (SURP140)

As well as an emphasis that the AST role experience was context specific, and depended on the colleagues and team the individuals were working with, as demonstrated with this quote:

This is my second experience as an AST, and I am loving it. My first experience in this role was awful. I had to get counselling, and I would have left education altogether had it not been for the great leadership team at my own school. This time around it is quite different. I work on my own quite a lot and miss having another AS teacher to bounce ideas off, but the lead principal works with me so that is great. (SURP39)

4.11.1.1 Opportunities Related to the AST Role. Opportunities included networking, contextual sharing of practice and gaining insights, additional PLD and resourcing. Participants ($n = 5$) appreciated the opportunity to network, both building on existing and creating new contacts:

I like the Kāhui Ako whanaungatanga [sense of kinship]. All our kura [schools] are individual hapu [subtribe] within our iwi [tribe]. Also being the only secondary school within our Kāhui we have a vested interest in working together with our junior schools with the vision of our kura being the school of choice for our communities. (SURP108)

This networking also led to contextual sharing of practice ($n = 4$): “I have enjoyed working with teachers from across the community because it has given me a far deeper understanding of the pathways taken by our students. It helps with big picture understanding” (SURP77).

As well as gaining insights from wider perspectives ($n = 1$):

At the beginning we felt like we were building the plane as we flew it and have taken the time to work alongside the teachers and students and find out what was / wasn't working for them, and we have adapted and changed our thinking and the way we work at times in response to the feedback given. (SURP58)

Participants ($n = 3$) valued the additional PLD opportunities and growth due to the Kāhui Ako: “I really appreciated the PLD opportunities I had in this role and the chance to work with inspiring people on our AST team.” (SURP15) As well as the dedicated release time to perform role was also important for one participant: “Allowed time and space to effect change across schools in an area I am very passionate about” (SURP86).

4.11.1.2 Challenges Related to the AST role. Challenges included a lack of a collective agreement on mahi to be done ($n = 2$), comparative difference between the perception of a Kāhui Ako versus the reality of the experience ($n = 2$), difficulties with release time and timetabling: ($n = 2$), ambiguity of the AST role ($n = 5$), role ambiguity with other ASTs ($n =$

1); challenges associated with a hybrid model ($n = 2$), the need to prove worth to others ($n = 2$) and lastly resistant principals ($n = 1$).

4.11.1.3 Influencing Factors. Positive influencing factors included: Lead principal(s) ($n = 4$), other ASTs ($n = 3$), other principals and senior-leaders ($n = 1$). Negative influencing factors were inclusive of other principals and senior-leaders ($n = 2$) and a PLD advisor ($n = 1$):

There were times when the local PLD advisor was very directive and negative about my role, in opposition to the principals, to the extent that I almost resigned. I did not feel well supported by the principals. (SURP125)

4.11.1.4 Participants' Affirmation in AST Role. Out of the 148 Phase 1 participants, 41% ($n = 61$) expressed positive affirming comments about their experience as an AST in the general comments. This included expressing the view that the role was a good fit, they had experienced personal growth, believed that the impact of their work created positive change in the Kāhui Ako and were enjoying the opportunity that the role gave them. In contrast, six participants described negative experiences as an AST and their lack of belief in the effectiveness of Kāhui Ako as an intervention for schooling improvement. Affirmation of success nodes included: Enjoyment, confidence, growth ($n = 44$): "Loved it, challenging, rewarding, thought provoking and gave me a wide range of collegial opportunities" (SURP90). Followed by impact and change ($n = 14$): "I have really enjoyed the new challenge; it has allowed me to follow and share my passions with other teachers and then see what they have done in their own classes" (SURP101). And finally, lessons learnt ($n = 2$):

I have learned to relinquish my need for control and exactness and have accepted that I have a part to play in the success of our Kāhui Ako. Everyone else involved has their part to play (their total success is not my responsibility). We all bring to a community of learning. He waka eka noa – we are all in this together. (SURP42)

4.11.1.5 Participants' Lack of Affirmation in AST Role. Six participants commented on their negative experience and how that impacted their success in their AST role in the general comments:

The size of the task proved very difficult, when we wanted to continually co-construct and build ownership, we became the complaints department. Whatever we did we upset somebody, there was no professional trust that we were making decisions for good reasons to support student learning. (SURP38)

One participant expressed they would not be reapplying for their role at the end of the fixed term, even though they had seen positive change in other Kāhui Ako, due to a perceived reputational risk:

I will not be reapplying for this position. I have seen that some Kāhui Ako are doing a great job and making significant changes in their learning community, but it's an awful lot of money for not much actual measurable change here, and I am not enjoying having my reputation tied to it. (SURP91)

4.11.1.6 AST Role as an Alternative Career Pathway. A total of 23 participants mentioned they were attracted to the AST role due to the idea of being on an alternative career pathway in the general comments: "There are limited opportunities for middle-leaders like me to advance their careers, other than into senior-management which did not appeal to me. The AST position offered another avenue for professional growth and pedagogical leadership" (SURP80). However, there were participants ($n = 10$) who questioned the value of the AST role as a genuine recognised career pathway and expressed concern about the role leading to career progression, their tenure, and the uncertain future of the Kāhui Ako policy. This uncertainty is demonstrated by participants INTP135:

I've been in the role for a while now and this cycle will be my last (I think time to move on), but I have no idea where to next? As, much as I have loved the role, I feel dead ended now. I have already been SCT at my school which I also loved and did that for

the maximum 4 years my school will allow. After this... I am not sure yet. A bit like the SCT role - wonderful role, but where do you go after that? (SURP135)

There were even participants ($n = 2$) who felt that taking on the role had not been beneficial and had in fact hindered their leadership career progress.

I do not feel like it is a recognised pathway towards leadership. When I have applied for leadership roles this has not been of any benefit in the application process. Feedback is that I have not had enough leadership experience, and I need to look for more opportunities first. (SURP82)

I would caution that this is not a next step into a leadership role. Whilst we are recognised and respected for what we do it has not helped a move into senior management but rather hindered it as we are out of the classroom and day to day school system working across schools. It is a great opportunity, but it is not an alternative career pathway. When we finish, we are back in the classroom. Many of us AST are concerned about this and are not sure of our next steps and how we use what we have learned when our time ends. (SURP112)

There was also a participant who, despite mostly enjoying the experience of doing the AST role and even though they had seen their colleagues use the role as a career stepping stone, personally didn't see it as a long-term role; for them it was more an interesting interlude:

Hard work at times! It can be very challenging navigating working across multiple schools and no one really knows what you do as the roles are unique and not like traditional roles. It has been a great experience, and the resourcing and support is excellent, but not a job you can stay in for extended amounts of time. Personally, I am looking forward to getting back into the classroom more. (SURP81)

Yet, in comparison one participant also expressed that the AST role "has allowed me to apply for the position and get the position of Kahui Ako leader" (SURP25), which could be viewed as a promotional career progression.

4.11.1.7 Desirable Skills / Aptitudes / Characteristics of an AST. Included comments that an AST needs to be collaborative ($n = 2$), resilient ($n = 1$), the need to have credibility ($n = 1$) and being highly organised ($n = 1$).

4.11.1.8 Suggestions / Advice on How to Make Kāhui Ako Successful. Eleven participants provided their views on how their Kāhui Ako could be more successful. The main themes focused on the importance of relationships and building relational trust before embarking on specific initiatives: “Much of the first year was spent developing an understanding of the role and building relationships across our Kahui Ako. This foundation year was essential to our success” (SURP17). There was also an emphasis that those relationships need to include all sectors such as early learning by “having all our ECE as part of our Kahui Ako” (SURP33) and all voices considered including:

Making sure we listen to the voices of our whānau is vital in creating effective and engaging programmes to accelerate Māori and Pasifika achievement that will challenge the white thinking spaces of our teachers and making them accountable to be culturally sustainable educators for future generations. (SURP47)

There was a comment whether an employed principal in a dual role as the Kāhui Ako leader was sustainable:

I query whether appointing a working principal as the leader of each Kāhui is appropriate and correct. Time and workload issues constrain their ability to carve out quality time to be and develop as productive leaders for their own Kāhui. Maybe we need Kāhui leaders who are not Principals to connect across Kāhui, whose purpose is to provide leadership that facilitates growth, without their own agendas. (SURP124)

This suggestion was supported by another participant who had a role in a Kāhui Ako which did not have an existing principal as the leader: “having an external lead as the principal has been highly effective in our context” (SURP30). Five participants commented on how to ensure the AST role was supported to be successful. These themes included more specific role

descriptions, more consideration about a PLD budget and support for the AST role: “Allowances for ASTs to get specific PD on how to lead effective teams. Please set up PLG’s like many senior-managers belong to. This role is an amazing opportunity to lift student achievement, however like all managers they need support” (SURP5).

4.12 Quantitative SPSS Analysis

SPSS was used for the analysis of quantitative questions in the questionnaire. SPSS is a software program for statistical analysis and data management. It provides a range of tools and procedures for data manipulation, descriptive statistics, inferential statistics, and data visualisation (Yockey, 2011). Furthermore, I used the Spearman rank correlation test. Correlation is a measure of an association between variables, usually in the context of a linear relationship, in the same (positive correlation) or opposite (negative correlation) direction. While the Pearson correlation coefficient is used for normally distributed data, the Spearman rank correlation is suitable for non-normally distributed continuous data, ordinal data or data with relevant outliers (Schober et al., 2018). The correlation coefficients range from -1 to +1, where the relationship gets stronger when the coefficient approaches an absolute value of 1. The correlation coefficients are often described in words as negligible (0.0-0.1), weak (0.1-0.4), moderate (0.4-0.7), strong (0.7-0.9) and very strong (0.9–1.0), although the cut-off points sometimes vary (Schober et al., 2018). Hypothesis tests and confidence intervals can be used to address the statistical significance (p-value) of the results and to estimate the strength of the relationship in the population from which the data were sampled. As shown in Table 4.25 a moderate positive correlation (Spearman’s correlation coefficient of 0.486, $p < 0.001$) was found between survey Q6. which inquired about the participants experience of respect, value, and recognition in their AST role and Q5. a self-assessment of their professional identity development. This finding confirmed the more respected, valued and recognised the participants were in their AST role, the more positive the impact on their professional identity development.

Table 4.25

SPSS Spearman Correlation Results of Phase 1 SPSS Spearman Correlation

		Q6. Mean	Q5. Experimentation	Q5. Validation	Q5. Confirmation
Q6mean	Correlation Coefficient	1.000	-.124	.120	.486**
	Sig. (2-tailed)		.154	.166	<.001
	N	141	133	134	136

** Correlation is significant at the 0.01 level (2-tailed)

4.13 Qualitative Summary

Of the 154 participants, 96% ($n = 149$) provided 1,155 additional qualitative comments. Tables 4.26 to 4.30 show the coded comments for Q1–Q7 and closing comments combined into the following themes of recruitment rationale, positive and negative influencing factors, opportunities and challenges and the desirable skills and attributes required to be successful as an AST from the perspective of the participants.

4.13.1 Recruitment Motivation for Applying for AST Role

Table 4.26 shows the combined totals of participant comments related to the recruitment motivation and rationale for why participants applied for the AST role. The most frequently occurring motivations related to both the desire to enact change ($n = 17$) and the opportunity to network with others ($n = 17$) followed by the kaupapa of the Kāhui Ako aligning with themselves ($n = 13$).

Table 4.26*Combined Comments: Recruitment Rationale for Applying for AST Role*

Theming Category: Recruitment Rationale / Motivation to apply for AST role			
Coding subtheme	Total	Coding subtheme	Total
To enact change	17	Existing involvement in the Kāhui Ako / wider community	8
Networking connections:	17	New role specific to skills, experience, or passion	6
Existing and creating new			
Kaupapa aligned with self	13	Leadership experience	5
Opportunity existed to apply for the role and was something different	12	Role as a tagged position	5
Encouragement to apply for the role by champions	9	Previous experience as a within-school-teacher	2
Future career opportunities	8	Using higher qualifications or PLD	1

4.13.2 Influencing Factors

Influencing factors relate to both the conceptual frameworks. On the teacher-leadership conceptual framework (pp. 64–65), influencing factors relate to the “means and targets” of leadership influence. Influencing factors are also part of the professional identity conceptual framework (pp. 70-71) and are described as factors (both positive and negative) that have a continued presence in one’s life and do not manifest as a single event. Influencing factors impact a person’s levels of self-efficacy and feeling validated in their professional role.

The combined results in Table 4.27 show that the participants stated they were most supported in a positive way by their AST colleagues ($n = 44$). The lead principal was both a positive ($n = 42$) and a negative ($n = 7$) influence. The other members of the Kāhui Ako senior-leadership stewardship group, employing principal and PLD advisor, were also described as being both a positive and negative influence. Other than the PLD advisor, all those listed were individuals or groups that are possible targets of leadership influence for those in the AST role.

Having a positive relationship with these individuals could be viewed as a measure of their impact in the AST role.

Table 4.27

Combined Comments: Influencing Factors Impacting the Effectiveness of the AST Role

Theming category: Influencing factors impacting the effectiveness of the AST role		
Coding node subtheme	Positive influencing factor	Negative influencing factor
Other ASTs	44	-
Lead principal(s)	42	7
Other principals & senior-leaders	24	8
Employing principal	16	7
PLD advisor	14	4
Within-school-teachers	13	-
Colleagues in other roles	7	-
Iwi and hapū	3	-
MOE advisor	1	-

4.13.3 Affirmation Experienced by Participants in the AST role.

A large proportion of participants who made comments, 89% ($n = 132$), stated they had experienced affirmation informally in their role as an AST. A total of 45% ($n = 67$) commented that from their perspective they had made an impact and brought about change in their role. A further 36% ($n = 53$) had experienced enjoyment and professional and personal growth with understanding new knowledge and feeling confident in their role. However, just 13% ($n = 19$) of the participants made comments that they had received a more formalised evaluation process that made them feel validated that they were being effective in their role. Two participants were grateful that the NANP reappointment process reaffirmed their effectiveness in their role. The need for a more consistent, systematic, and formalised feedback / appraisal process for the AST role was an important finding in Phase 1.

4.13.4 Opportunities and Challenges of the AST role

Tables 4.28–4.29 show the combined totals of participant comments related to opportunities and challenges that the participants believed impacted their effectiveness to perform the AST role and the outcomes achieved or not.

Table 4.28

Combined Comments: Opportunities from the Perspective of the AST Participants

Theming category: Opportunities from perspective of the AST participants	
Coding node subtheme	Total
Networking: building on existing and creating new	35
Additional PLD opportunities and growth due to Kāhui Ako	27
Contextual sharing of practice	14
Dedicated release time to perform role	13
Gaining insights from wider perspectives	10
Transitions: Importance of sharing data	3

Table 4.29

Combined Comments: Challenges from the Perspective of the AST Participants

Theming category: Challenges from perspective of the AST participants			
Coding node subtheme	Total	Coding node subtheme	Total
Role clarification: Ambiguity of the role	45	Role clarification – WSTs	7
Willingness to engage	32	Lack of leadership guidance & support	6
Resistant principals	26	Professional jealousy	5
Personnel instability	23	Problematic release time/timetabling	4
Accountability: Proving worth to others	23	Role clarification (with other ASTs)	4
COVID	17	Understanding different perspectives	3
Perception of Kāhui Ako vs reality	17	Job sharing with others	3
Hybrid model: Doing all roles well	15	Contextual – role dependent on Kāhui Ako	3
Resistant senior-leaders	14	Resistant WSTs	2
Resistant colleagues	13	Small rural sole-charge schools support	1
Lack of agreement on kaupapa / mahi	11	Role clarification (with other colleagues)	1
Aligning AST release time to come together:	11		

4.13.5 Desirable Skills and Characteristics Required to be a Successful AST

Over half of the 148 participants (57%) who wrote comments referred to skill sets, dispositions, and characteristics that they believed were crucial to be successful in the AST role. The top seven are shown in Table 4.30. Comments also included the value of modelling vulnerability as a learner, knowing when to “let go”, and the requirement of resilience and adaptability.

Table 4.30

Combined Comments: Desirable Skills / Characteristics Required for AST role.

Theming category: desirable skills / aptitudes / characteristics required to be a successful AST	
Coding node subtheme	Total
Relational	21
Credible	14
Communicative	10
Collaborative	8
Strategic thinker	4
Knowledgeable/research backed	3
Ability to build capacity in others	3

4.14 Chapter Summary

Phase 1’s Qualtrics questionnaire provided some significant insights related to the reality of the implementation of the AST role. Some were expected; however, some had surprised participants and were unexpected. These insights included:

- The majority of the participants were attracted to the AST role as a career choice that would expand their prospects including the opportunity to build on networking connections. Participant’s belief in the kaupapa that underpins Kāhui Ako, the desire to make a difference for learners and effect change where they were employed and / or in their community were also expressed as strong motivators.
- The NANP recruitment process was a polarising experience with most of the participants finding the initial application process as onerous, daunting, euro-centric and gave less than half of the participants a strong understanding of the detailed expectations of the AST

role. The reappointment process was also viewed as onerous however there were mixed views whether it was helpful as a reflective opportunity.

- Other than the NANP reappointment process, findings showed a substantial lack of any systematic reflective and feedback mechanisms on the effectiveness of the AST role which was coupled with a culture of humility and not wanting to be seen to be looking for praise. This is a meaningful finding due to the fact effective professional identity development requires both self-efficacy and validation from others.
- Participants were appreciative of the opportunities that the AST role provided including the dedicated release time to perform the AST role, additional PLD opportunities and the professional and personal growth due to being in the AST role and their Kāhui Ako.
- Challenges participants faced included the lack of willingness to engage and collaborate from members in the Kāhui Ako which in some cases extended to experiences of outright resistance behaviours. Other challenges included professional jealousy, role ambiguity and the hybrid nature of the role and therefore the need to juggle all their responsibilities.
- The top scoring desirable skills / aptitudes / characteristics to be successful as an AST included being relational, credible, communicative, and collaborative.
- The participants did experience positive influencing factors especially in their interaction with their Kāhui Ako lead principal, fellow AST colleagues and PLD advisors. However, for those participants impacted by negative influencing factors, especially from other members of the Kāhui Ako, it was impactful on their effectiveness in the AST role and had a lasting detrimental impact on some participants' professional identity development.

These findings, along with Phase 2's findings, will be discussed in detail in Chapters 6 and 7.

The next chapter outlines the findings from Phase 2's phenomenological interviews. The intention of Phase 2 was to be able to have further dialogue with volunteer participants from Phase 1 and for them to share what they deemed important about their lived experience as an AST.

CHAPTER 5: Phenomenological Interview Findings

The process employed to conduct the interviews was designed to ensure participants were provided with an opportunity to describe their full lived experience as an AST. As outlined in detail in Section 3.5, transcendental phenomenology is a philosophy, a method, and an approach (Patton, 2002). The interview consisted of four main questions that were intentionally designed for the participants to decide what was important to them to share about their lived experience as an AST and not predetermined by the researcher with any leading questions:

1. Tell me how you came to be an across-school-teacher.
2. Tell me about what it has been like to be an across-school-teacher.
3. What would you advise your former self from where you stand now?
4. Are there any other points or messages not yet mentioned you would like noted as part of this research?

5.1 Data Explication Summary

For each transcript, Moustakas' (1994) 10 steps were followed as described in Section 3.5.2. From the 28 interview transcripts, 1,687 statements relevant to the phenomenon of this study were identified. A further horizontalisation (reduction and elimination) process identified 846 invariant constituents. The term *invariant constituents* describes the essential elements or building blocks that are present in a particular experience regardless of individual variations or interpretations (Moustakas, 1994). Cognisant of researcher reflexivity and the necessity to be true to the phenomenological research design intent to capture the essence of the participants' lived experience this chapter has been presented in the participant's own words (in italics).as much as possible. A genuine phenomenological written report reads like a narrative to tell a story; therefore, pseudonyms have been assigned to each participant (Giorgi, 1997). Additionally, due care has been taken in writing this chapter to ensure all voices are equally represented and not dominated by the few to demonstrate the shared experience.

5.2 Composite Textural – Structural Descriptions for all the Participants

This step consisted of synthesising all 28 participants' composite textural and composite structural descriptions so as to "communicate the most general meaning of the phenomenon" (Giorgi, 1997, p. 20). A composite textural-structural description integrates both what (texture) and how (structure) participants experienced the phenomenon, namely the development of professional identity development in a new teacher-leader role. In this composite, the most common or core essences of the participants' shared lived experiences have been captured. However, it was also crucial not to ignore the unique and different views of the participants in presenting their story (Giorgi, 1997; Hycner, 1985; Hycner et al., 1999; Moustakas, 1994; Van Manen, 1990).

Building on the anchor thematic codes from Phase 1, the participants' collective common lived experiences that impacted their effectiveness in their AST role and influenced their professional identity development included the following themes:

- recruitment experience into an AST role.
- positive and negative critical incidents.
- positive and negative influencing factors.
- opportunities and challenges.
- shared affirmations of success in the AST role.
- shared recommendations from the perspective of the participants of what an educator embarking into an AST role requires both in personal characteristics and desirable employment conditions, to be effective.

5.2.1 Participant Group Description Summary

The collective of 28 participants ranged from 30 years of age to over 61 years old (see Section 3.6.4 and Appendix G for more detail). In summary they were a mix of gender and ethnicity including New Zealand European, other European, New Zealand Asian and Māori. The participants held teaching positions along the compulsory schooling continuum from early

learning and the school Year 1–13 levels. The collated demographic data provided some insights into the context of the “professional pool” they came from when they were recruited into this the AST role. This data highlighted that every participant’s school and professional context was unique and varied significantly. Participants described a range of previous middle and senior leadership experiences, professional backgrounds, and roles they had held before their appointment into the AST role. Curriculum leadership was the highest proportion of previous experience, with most of the participants having been a curriculum leader followed closely by those who had held other middle-leader positions such as team-leader, HOD and syndicate-leader. The participant group also included secondary teacher-leaders who had held the pastoral position of a dean. A high number of participants (23 / 28) described themselves as performing the AST role while maintaining either a partial or full responsibility of other roles in their school. These participants expressed either a personal reluctance and / or pressure from their school principal and other colleagues not to relinquish their previous responsibilities despite this meaning they were holding too many management units and / or not meeting the minimal teaching component, therefore in breach of the NZEI and PPTA collective employment agreements. Collectively the participants had been in the AST role from fewer than 6 months to more than 2 years but fewer than 4 years.

5.2.2 Motivation to Apply for AST Role.

The participants were driven by both extrinsic and intrinsic motivations to apply for the AST role, including: wanting to enact meaningful change, a personal alignment with the kaupapa of the Kāhui Ako, believing the AST role was an extension of work they were already doing, an opportunity to network with new people, wanting do something different, in pursuit of a passion and leadership experience that may lead to future career opportunities. Interestingly, some participants were initially reluctant to apply for the role and many were championed by others to apply.

Participants described an innate drive to enact meaningful change in the AST role. Susan believed she had a “*skillset and passion*” for working with adults across levels and wanted to put that into action to “*support change*.” Chloe believed that teachers can be “*insular*” in education and liked the idea of moving away from the “*blame game*” between the different sectors. James believed in “*servant leadership*” and that certain roles such as the AST serve a function for that community. For others it was important to have a connection to the kaupapa (purpose) and theory of improvement of Kāhui Ako that aligned with themselves and their beliefs, as demonstrated by Aroha:

It was more the context that was being looked at that drew me as it was around culturally responsive practice. I suppose it was also about being Māori. I saw this as a way to ensure success for any Māori child and in fact we know it's not just Māori, we know that the pedagogy works for all tamariki [children] but I'm primarily about any Māori child in school, that was the vision. A chance to make a difference here. So, I thought I need to give this a shot, this is somewhere I will be passionate.

There were participants who described their recruitment motivation as opportunistic due to viewing the AST role as a chance to gain validation, financial compensation and to extend the type of work they believed they were already engaged in within their wider community. Mary, Miles, and Amira described the AST role as a “*dream job*” that would mean getting “*paid and given the time*” to do what they had already started doing in the wider school community. In contrast, a strong theme emerged from some participants who were attracted to the AST role due to the opportunity to do different types of educational work, demonstrated by Emma and Lily.

I have been a HOD, a dean and a SCT in my 17 years at my school and this role felt like the next semi sideways step when the role came up. I could see it giving me an opportunity to work with a broader range of staff. (Emma)

I am someone who likes to take on a new challenge and do something that others have not done before and be a pioneer of sorts. The AST role was an opportunity to do something different than what I had been doing and different from what I could see offered in other more traditional senior-leadership roles like a SENCO. (Lily)

Others saw the AST role as an opportunity to network. Daniel's motivation to apply for the role was out of "*sheer frustration*" due to the size of his school and that his "*sphere of influence was negligible*" and he felt "*completely invisible*." In his opinion the AST role meant he would be able to "*get around the table*" and network with the "*important people*" and have some say in the change initiatives. Daniel was also in a "*dysfunctional*" department at his school and the position gave him a chance to "*escape*" that situation and be in a more "*positive team*."

Henry and Michael described themselves as individuals who "*like to learn*" and "*better*" themselves and saw the AST role as an opportunity to use the higher qualifications they had gained in their respective master's degrees and put that knowledge "*to good use*." The aspiration to improve their skills, knowledge and experience in a wider education setting also extended to Liam, Hoana, Chloe and Henry who expressed that they applied for the role due to wanting leadership experience and the possibility of future career opportunities. Henry described the "*skillset*" gained from the AST role as enabling him to "*build knowledge and skills*" that would be "*really useful*" in a senior-leadership environment. He had also observed previous ASTs being "*thrust*" into further leadership opportunities and aspired to that for himself.

Isabella's rationale for applying for her AST role related to her perceived prior understanding of what the role would entail. This prior understanding related to her teacher-leader experience in the UK where she had been an advanced skills teacher. In her opinion, the AST role had appealing similarities. She saw the main difference would be that in the UK she had been contracted out of her school to work in other schools whereas in the AST role she would still be based in her own school.

Scott, Henry, Chloe, Keri, Liam, and Brent had all previously held a WST role and believed this experience was “*invaluable*” as a “*stepping stone*” into the AST role. They also felt this prior Kāhui Ako experience was beneficial in completing their recruitment application and contributed to their prior understanding of what the AST role would entail.

There were participants who were initially reluctant to apply for the AST role. Isabella, Miles, Holly, Claire, Hoana and Sarah consciously passed on the opportunity the first time the role was advertised due to feeling they did not know enough about Kāhui Ako and the AST role. Hoana’s reluctance was due to her thinking it was not the right “*fit*” for her and she didn’t want to leave the bilingual unit due to the difficulty of trying to find te reo Māori (Māori language) teachers to backfill her, consequently it took a lot of “*prompting*” from various colleagues for her to eventually apply. This change of heart also included that, in her view, “*everything Māori was locked up in the Māori department and only came out when someone asked a question, or it was te ao Māori week*” and by applying she would be able to “*release the human and paper resources.*”

This prompting by other colleagues after a vacancy became available was a common occurrence described by participants. These “champions” of participants came from all levels of the schooling community including their own employing principal and other senior-leaders including the lead principal. This was exemplified by Eve who was encouraged to apply by the lead principal for a tagged-specialist AST role to utilise her expertise in ESOL (English for speakers of other languages) to expand that knowledge across the Kāhui Ako: “*I would still be an ESOL teacher just doing my thing with my own students and reaching out to others I’m involved in the local ESOL cluster...he has really championed me and my cause and my soapbox*” (Eve). Miles, Michael, Hoana and Aroha were championed by Māori connections within whānau, hapū and iwi.

5.2.3 *Experience of the Appointment Process*

The NANP recruitment process was a polarising experience for the participants and had a lasting first impression on the genesis of their professional identity journey to become an AST. All agreed that it was a lengthy “*hard core*” process requiring in-depth thought and consideration in comparison to other leadership applications. Lily had been on a school board that had employed principals and DPs and she thought there was “*more writing and evidence*” needed in the AST applications than expected of other leadership positions. The majority of the participants described the application process as “*very strenuous*.” The only outlier was Holly who stated the appointment process had been an opportunity to reflect on how much she had learnt in her career and how each school she had taught at had its “*own flavour of professional development*.” The application process made her realise how “*rich that journey had been*.” By the time she had finished the application form, “*it was like a mini thesis*” but it made her “*feel good*” about herself.

For Hannah, the application process was not only a “*daunting and intense*” process, but it was also “*high stakes*,” with her own interview consisting of 12 principals and an “*official from the ministry*.” She went into the interview feeling: “*If I blow this, I blow it for any potential employment in my locality. If you look at the lifespan of a teacher, you really want to make the best impression*.”

James described how he had the “*most horrific appointment process*” that took over 6 months to finalise and consequently he started much later than the other ASTs in his Kāhui Ako. He was initially told by the principal stewardship group he was successful in getting the role. Then the NANP person told him he did not “*meet the criteria*.” He then worked with the PPTA to get a resolution. For James it was a “*stressful time*” and made him feel that the process was “*weighted towards primary teachers and certainly not practical subject teachers*” like himself.

In Hoana's opinion, the recruitment process went against everything she believed as a Māori woman:

The application form was off putting, and I thought there is nothing cultural in this application. I had to blow my own trumpet for every question. That was difficult for me. Kāore te kūmara e kōrero mō tōna ake reka [The kūmara doesn't speak of its own sweetness]. I gave up. I don't know how many times and thought "I just can't do this". Also, with humility I had colleagues who had been in the community longer than I had and I thought just move aside and let them spread their wings. The questions were quite repetitive, and I got lost in the dialogue. Referee checks are not until after the application process so there was nowhere for me to say speak to this person who can vouch for me. This process was against my philosophy as a kaiako [teacher].

Hoana further explained that to complete the NANP written application she had ended up "sitting next to whānau, colleagues and former colleagues" and her final application consisted of what they said about her because she didn't feel she could write it herself and "they reminded" her of things that she had achieved in her career.

The reappointment process was also a polarising experience for all participants in relation to it affirming them as being competent and it being beneficial as a reflective process regarding their effectiveness as an AST.

Eve stated that the reappointment process was "ridiculous and wasted a lot of people's time" and that in her opinion a lot of the application form questions were not "related" to her current AST role. Eve saw the process as something that had to be done "to roll over" her role. She also believed there was a "real lack of clarity" around what the lead principal was required to do. In her opinion, the process could be clearer and was "quite unprofessional." Yet, in contrast, Oliver stated that, compared to the initial application process that, in his opinion, was "intense and bureaucratic," he "really enjoyed" the reappointment process and found it "very

affirming” of what he had been doing and “*conversational*” and it gave him an opportunity to get some “*positive feedback from the principals and a sense of accomplishment.*”

All participants in Phase 2 commented that the initial NANP written, and interview application processes did not provide a clear understanding or clarity regarding the AST role and the types of activities it would entail.

5.2.4 Positive Influencing Factors

The participants discussed positive influencing factors that supported their development and contributed towards their effectiveness as an AST and impacted positively on their professional identity development. These factors were related to colleagues they were interacting with in a professional capacity such as senior-leaders, other ASTs, colleagues, PLD advisors and individuals from local iwi and hapū.

5.2.4.1 Lead Principal(s) All the participants spoke of how influential their lead principal(s) were, using descriptive words such as those from Chloe of “*amazing*” and “*collaborative and open to ideas.*” Emilia was employed within the early childhood learning sector and was “*pleasantly surprised*” with how she was welcomed by the other sectors with “*open arms by the co-leaders...who demonstrated a strong commitment to promoting the need for a formal ECE role and held quite a bit of knowledge of early learning and her assumptions were completely thrown out the window.*” Susan explained that her lead principal was a “*saving grace*” and if it was not for their “*leadership, guidance and being able to talk things through,*” it would have been a totally different experience for her. Hannah described how the influence of her lead principal impacted positively on how her AST role was embedded in the Kāhui Ako because it was “*reframed*” not as “*expert*” but instead as a “*research and development model.*” This provided the opportunity for the ASTs in her Kāhui Ako to explore colleagues’ practice with “*inquiring eyes*” rather than being seen as “*fixing others.*” Therefore, her AST team introduced themselves to colleagues and asked, “*how can we help?*” In Hannah’s opinion this approach “*gained an awful lot of traction with local schools.*”

The ASTs' relationship with their lead principal was also described as being even more “*crucial*” and “*close*” for Liam, Oliver, Michael, Natalie, Sarah, and Matthew who were sole ASTs in their Kāhui Ako. These ASTs expressed their appreciation of the strong professional relationship they developed with the lead principal compared to their understanding of the experiences of ASTs in larger Kāhui Ako as demonstrated by Matthew's narrative where he explained there is “*a difference between the relationship I have with our lead principal as we are a tight team compared to Kāhui Ako who have two, three or more ASTs and have a different dynamic.*”

5.2.4.2 Employing Principal A few of the participants spoke about how influential their employing principal was in their ability to be effective in their AST role and how they had had a positive impact on their professional identity development. Aroha appreciated that in her school the principal demonstrated approachability and a commitment to the kaupapa of the Kāhui Ako:

If you have a passion, he's the kind of person you can go to and talk to. He's a great sounding board and he will do what he can to help to enable anything to happen, so I knew that I had his backing. Also being culturally responsive is part of the philosophy of our school anyway.

Matthew was grateful to have a “*very supportive*” principal that made his timetable manageable so that he could have dedicated time that was “*sacred*” for Kāhui Ako work. Susan and Miles were grateful for how their release time was set up and that the “*consistency*” of “*highly quality*” release teachers they were “*gifted*” had been “*key*” to their success in their roles and “*stacked in their favour.*” Susan was aware that other AST colleagues had not had the same experience and observed it had been a “*nightmare*” for them because the relief teachers employed to teach their classes were not effective and this provided tension and difficulties when they took time away from the classroom for their Kāhui Ako work.

5.2.4.3 AST Colleagues The second most positive influencing factor expressed by the participants was the quality of other ASTs they worked with in the team. The importance of getting to know their AST colleagues and “gelling” as a team was paramount and expressed as “critical” to shaping how their roles evolved. This gelling required a time commitment and, as Isabella explained, the whole of her first term was used to develop professional relationships with other ASTs. This included learning about each other’s strengths and areas of interest and “moulding and creating” their roles collectively. Aroha also appreciated working “closely” with her AST team and described how they would meet once a week and collaboratively “discuss issues and work out strategies.” Participants spoke of the commonality with their AST colleagues including being new to the role, their passion for teaching and being “like minded” about such things as problem solving and protocols for delivering the required interventions. Susan explained that she and her fellow ASTs were passionate about “pathways and where kids go next.” Keri was grateful for her “strong” AST team who were “open and honest” with each other and forthcoming with their “shortcomings and strengths.” By being “open to new ideas” and “willing to learn,” the role had “satisfied” Keri’s need for “high-level professional engagement” with education colleagues. Due to the “huge ups and downs” of the AST role, Daniel was grateful for the other six ASTs he worked with who he believed had “gelled very quickly as a team” and he did not think he would have “survived” if he had been a single AST in a Kāhui Ako. He was especially appreciative of being paired up with another AST who was “very experienced,” and he believed he learnt a lot from observing their practice and that this had “influenced” his own. Miles also appreciated the ASTs he worked with; as he expressed, they were “really strong”, and he could see “why they all got the role” and they had been “amazing” to work with. Miles explained that normally he did not enjoy meetings; however, he found his AST team meetings were “punchy and to the point and not mucking around and very professional.”

In contrast sole ASTs Liam, Oliver, Michael, Natalie, Sarah, and Matthew described themselves as the “*lone ranger*” which at times could be “*lonely*”; but, due to their “*autonomy*,” they were able to work at a “*different pace*” and did not need to rely on others to collaborate on professional work. However, as expressed by Natalie, being the only AST had limitations:

I have only my skill sets and don't get to benefit from others who have other skill sets. I also don't have anything to gauge myself on or a sounding board that my work output is right and that I have been successful. It can be lonely. It is hard to not internalise if what I am doing is enough?

The participants who were not initially appointed as ASTs in the Kāhui Ako when it first formed but were appointed in the later years expressed how they valued the support they received from those ASTs who had been previously appointed. Eve described her relationship with experienced ASTs in her Kāhui Ako as “*critical*” in helping her understand her new role. Conversely, the “changing of the guard” of ASTs in Kāhui Ako also provided challenges which will be explained later in this chapter.

5.2.4.4 Professional Learning and Development Support Participants also spoke highly of what a positive influence external PLD advisors and expert partners had on the Kāhui Ako they operated in. Oliver explained that his Kāhui Ako had worked with a change manager who, in his opinion, was “*instrumental in getting traction*,” especially in organising and “*rallying all of the principals*.” Mary expressed from her viewpoint the expert partner that worked with her Kāhui Ako had been a “*game changer*” and her “*journey*” was more “*relevant and inspirational*” due to that experience. Henry described that he was “*very supported*” by an external PLD provider due to the individual being at the “*top of their game*” which in turn gave him “*confidence*” in his AST role. Daniel appreciated the amount of PLD support from various advisors that helped him with “*getting up to speed*” and was helpful in supporting teacher-led inquiries. Aroha explained that her expert partner provided expertise to call upon and supported her understanding of different strategies and ways to take the “*blinkers off people and get them*

engaged.” Matthew described how the MOE funded PLD aligned with the achievement challenges and an expert partner was “*crucial*” and “*wonderful*” and gave him a “*structure*” around his “*creativity*.” Eve’s PLD support came from an advisory team at the university that she already had a connection with and saw a similarity in their roles:

She’s been a mentor for me right through my journey in terms of being an English language teacher. I was able to talk to her, because really, there’s a real crossover between what the advisors do and what an AST does, and she was very generous and gracious, and we talked a lot about how to go into a school, particularly schools that you don’t know well. She was able to help and share some resources which I have been able to adapt around scoping and reviews. She was, and continues to be another, critical person in terms of mentoring me as a leader. You are often in an advisory role as an AST and so she’s been very helpful.

5.2.4.5 Other Principals and Senior-Leaders Some of the participants did feel that other principals and senior-leaders in the Kāhui Ako were a positive influencing factor in their AST role. Aroha explained she was part of a “*collaborative model where sometimes the leadership team held the strengths and sometimes the ASTs did.*” Hannah found working and networking with the other principals in the Kāhui Ako had been so beneficial that she had become employed at a different school in the Kāhui Ako, still in the AST role, due to those connections.

5.2.4.6 Kāhui Ako Community Aroha, Miles, and Michael explained the influence of iwi and hapū in relation to their effectiveness in their AST role. Aroha commented that influence did not always come from formal positions:

We do have champions within the iwi that tautoko [support] us too, but it’s not always the ones in the formal positions. When you get hit down, they pull out a whakataukī [proverb] to remind you that this is just the journey you’re on.

Miles explained he had the support of the local kaumātua (respected elder) at the local marae (meeting place) which he described as being “*really vital*” when engaging with other schools. In his opinion, sometimes principals might not agree with the tikanga (customs) and kawa (protocols) that are being presented, but when they are validated by the kaumātua they are much more likely to accept their position. He explained his role was a “*privilege*” and an “*honour*” to bring all the tūmuaki (principals) to the marae with support from the kaumātua. In contrast, Michael’s journey to get support for his role and what he was tasked to achieve was not as straightforward and that had surprised him, however, he was proud of the end results:

We have a mixture of English-medium schools and kura kaupapa and with my role being localised curriculum I was perceived as not the right person because I am not Māori even though I have Māori descent, but I don’t look Māori, so it took a while to break down those barriers. I was surprised at the resistance. However, I am really proud of the framework that has been designed and the positive response from not only all the tūmuaki of the kura but also the kaumātua of the different iwi.

5.2.5 Negative Influencing Factors

There were a few participants who discussed influencing factors that had a negative impact on their ability to be effective in their AST role and had a detrimental lasting impression on their professional identity development.

5.2.5.1 Employing Principal In contrast to those ASTs who spoke of the great support they received from their employing principal, Lily, Susan, Michael, Amira, and Keri did not feel supported. This lack of support was mainly related to their principals not taking into consideration the impact of ineffective timetabling, limited classroom release time and not readjusting other school responsibilities on their ability to do their AST role. Withholding AST release time and allowing the AST to have too many management units due to other responsibilities were also in breach of the participants’ entitlements as outlined in their respective teacher collective agreements.

Keri did not believe she received any support from her own principal, especially related to timetabling and class release. She had been given the same timetable as before she took on the AST role and she only got relief cover when she requested it and therefore the added workload of needing to set relief lessons for all her classes. She still held all her curriculum responsibilities, a form class, full duty, and assembly supervision. This situation led to her not feeling “*valued*” in her own school. She went further on to explain it took her lead principal and PLD advisor to go into “*bat*” for her to get some movement in relation to the release time she was entitled to. Lily expressed that the “*workload balance*” had been “*really hard*.” Her principal told her straight out that she should be able to do the AST role on top of what she was already doing if she was “*really passionate about it*.” Therefore, Lily was expected to continue all her previous responsibilities, including head of learning support and her special education needs co-ordinator role (SENCO), and overall “*only lost an hour of teaching time*” in her role as an AST. Susan believed her own principal viewed her as an “*Achilles heel in the whole system*.” This resulted in her needing to do “*more and more*” in her own school as well as her AST role due to the “*negativity*” she was receiving and the pressure to “*justify*” her role. Susan was grateful for the support she received from her lead principal and believed that they “*came into their own*” due to them “*backing her*” and became an “*advocate*” of her AST role with her employing principal. Michael believed his employing principal had “*flipped flopped*” and he was now having to “*justify*” what he was doing even though the other principals in the Kāhui Ako were “*impressed*” with what he was doing. He was “*surprised*” by this change in attitude and had thought he would have his own principal’s support considering he had “*encouraged*” Michael to take the role at the start. Anira’s employing-principal experience had been both a negative and positive influence due to a change in principals at her school. The initial principal blocked her from applying for the role by “*not allowing*” her to, explaining she was “*needed too much*” in her school. In comparison, her current principal was much more supportive and was instrumental in her successfully becoming an AST.

5.2.5.2 Senior-Leaders Another negative collegial influencing factor that some of the participants experienced came from other senior-leaders in their own schools, some passive aggressively and some straight-out expressing negative attitudes demonstrated by these two quotes:

“I had both my AP and DP telling me the money could be better spent in education and they did not see the value.” (Susan)

My head of faculty has widely said that COL is the worst thing that has happened to the school, and I haven’t felt I can say anything to that, so I have just stayed quiet in my own department and don’t even try to validate my AST role to him. (Daniel)

5.2.6 Opportunities due to AST role

Participants spoke about the different opportunities they experienced that had a significant impact on their ability to do their AST role effectively. These included: building and creating new networks, the significance of the dedicated resourcing allocated to the AST role and the personal and professional growth experienced.

5.2.6.1 Networking. The opportunity to build and create new networking opportunities was not only a motivation to apply for the AST role, but it was also seen as “*crucial*” to the success of the AST role and Kāhui Ako was seen as the vehicle to be able to do that because, as Mary observed:

The Kāhui Ako gives a much bigger forum compared to being isolated in schools and you have so many more networking opportunities to work with a raft of people you would normally never come across. As AST you can instigate change on such a large scale with a big audience.

In Hannah’s words, when she started in the AST role “*it was a lot of networking and tea and cake*” and from her perspective she could not “*stress enough*” the need for “*relationship building*” from a “*culturally responsive practice mode.*” For Hannah, this networking resulted in “*buy-in*” from all the schools which also meant “*access*” to all their teachers, which she

leveraged off to deliver “*Kāhui Ako-wide PLD on inquiry learning.*” Hoana believed networking was also an opportunity to be able to “*ascertain who had the cultural responsiveness responsibility*” in the schools and who had release time associated with that responsibility and then tap into those people. The main success that Oliver saw from his Kāhui Ako networking resulted in teachers meeting other teachers from outside of their schools, developing relationships, having conversations, and then “*taking those learnings back to their own classrooms*”. Brent saw the opportunity of networking more from a personal gain perspective and “*allowed*” him to meet a lot of the people in his Kāhui Ako and therefore created “*opportunities*” to have his “*name out there*” for future possibilities.

Participants also expressed that the potential of the Kāhui Ako and the building of networks also extended to the importance of quality transitions between educational providers and how that in turn was experienced positively by the ākonga and their whānau. A few participants spoke of the opportunities as ASTs to improve the transition of students at key points. Scott, for instance, had experienced a “*movement*” of understanding in his Kāhui Ako that transitions needed to be “*seamless*” and “*built on*” from each educational provider because, to be successful in their achievement goal of raising National Certificate of Educational Achievement (NCEA) results, “*the work needs to start at the beginning of a child’s education because once students get to NCEA levels there is limited time to make the impact needed.*”

Amira, Hannah, Lily, and Eve, in particular, saw networking as also an opportunity to raise the profile of the specialised subject areas they had originated from and a way to extend and “*formalise*” a lot of the work they were doing anyway with learners who had learning support and language needs. Amira, Hannah, and Lily had learning support responsibilities in their own schools. They all believed that with the Kāhui Ako implementation they were able to raise awareness, network and galvanise relationships with others that also had learning support responsibilities. Eve also expressed the impact of networking in her AST role dedicated to English language learners (ELL) due to the Kāhui Ako stewardship meetings and the

achievement challenge focus on ELL: *“suddenly it is something that principals need to be aware of and address.”* Her AST-dedicated role also gave her a *“platform”* to be able to talk to the principals about the challenges that she had seen in terms of the ELL data and current practice in schools. Eve was also able to call on her existing casual ELL networking connections in a more formalised and substantial way. Eve believed that this increased networking opportunity had resulted in the numbers of funded learners increasing dramatically in some schools, for example: *“One school had less than 10 funded learners, now they have over 20 and more importantly, those students are getting targeted language teaching that in the past they would have missed out on.”* The introduction of the AST specialist roles in the mix with the other specialist roles and the challenge of role clarity and therefore the need to seek clarification on *“where one of them started and the other finished,”* is discussed further in this chapter.

5.2.6.2 AST Resourcing. The dedicated AST release time to perform the role was a significant contributing factor to the success of the role for many of the participants. Sarah believed the AST time allocation had given her *“dedicated time to think”* which she saw as a *“privilege.”* For Keri, it was *“critical”* to be able to get her *“teeth into something and make a change.”* Claire reflected that having realise time at the same time as the other ASTs in her Kāhui Ako created an opportunity for *“powerful, rich discussions.”* Scott found he could rely on the release time to not be interrupted, compared to his previous pastoral dean role; he could *“manage time so much easier”* and respond to staff *“more or less instantaneously”*; and the dedicated release time made his AST role a *“plannable workload.”*

The structure of the release time from classroom teaching was also important to the participants. Michael wanted to make sure his time out of the classroom was *“less disruptive”* for his classes and therefore approached it *“creatively”* and had 1 day a week release instead of 2 in Term 1 and had all of Term 2 not teaching. However, this did mean he did not have much time at the beginning of his tenure to *“build relationships”* with others in the Kāhui Ako. Daniel had a mixed experience in relation to his release time due to a change in lead principals. His

first lead principal “*fought*” for the team of ASTs to have their full release time and for that to be at the same time. Daniel saw this as “*fundamental in setting a foundation*” and in his opinion the AST group would not be the team they were if not for that time. Since changing lead principals, it had been more “*problematic*” to get all eligible release time and at the same time, as a team. He has also heard from other Kāhui Ako that they didn’t get all their release time and certainly not at the same time, and he didn’t know how they would be able to do their job well without it, they must feel “*very isolated*” and would need to have “*some really strong support systems to survive*.” The release time did also contribute to some other challenges, which will be discussed later in this chapter.

5.2.6.3 Professional and Personal Growth. Most of the participants spoke of the opportunity for PLD and growth due to their AST role and being part of a Kāhui Ako. Scott saw the benefit of Kāhui Ako-wide PLD, especially for a more isolated community like his, because, in more provisional areas, PLD was “*very hard to access compared to large cities*.” Daniel explained he had never had so much PLD, training and mentoring in his career, “*in fact, until now had been practically absent*.” Henry appreciated a “*shift*” by the leaders in his Kāhui Ako to “*evidence-based PLD*” rather than, as in the past, PLD being based on “*good ideas*” and whether a leader liked something or not. Additionally, in his opinion, some “*educators get caught up in the doing of these good ideas and if that was effective, we wouldn’t have the inequities that we do*.”

Claire, Henry, Isabella, Amira, and Mary spoke of the personal and professional growth they experienced due to the AST role. Henry believed his growth had been a “*steep learning curve*” due to being “*thrust into the spotlight quickly*” from being a classroom teacher and a few years as a formal leader, to then be expected to go to schools he had little knowledge of and “*expected to be able to influence*.” In contrast, Isabella had experienced “*a progressive journey*” that had been “*exciting*” and “*rewarding*” to have “*put things in place*” and to be “*validated*” in her AST role by being reemployed for a further 2 years. For Mary and Amira,

their growth had been having the confidence to now “own” their “voices” as an AST. Claire believed she would not have received the same level of PLD in her own school and had gained “so much personal and professional growth” on her “amazing journey.” Her “stimulation” also came from learning from other teachers due to being out and about in classrooms. The AST role had “improved” her own classroom practice.

Other participants spoke of the potential of Kāhui Ako for the insights gained from contextual sharing to contribute to professional growth and teaching practice, as mentioned by Oliver:

None of us are as clever as all of us. The journey and the process are significantly more important than the numerical outcome at the end. We will get the targets as expected but it is about what we have done to make those changes that needs to be captured. If the teacher has changed their practices due to connections with others that is what matters and the ability to now say – I will give that a go.

Lily saw the benefit of being in the “privileged” position to “come in with fresh eyes and a break away from the politics and hierarchies and help highlight the positives.” Henry found the “variety” of his day “amazing” and appreciated the opportunity to be “able to learn from others teaching their craft.” Aroha believed that for real growth to happen, insights gained had to also include whānau, hapū and iwi perspectives:

It is a privilege to be part of the conversations and to be able to have robust debates with people of a high calibre and learn from them. Then critically thinking through everything as it happens and then go back and work with our whānau, our hapū and our iwi. We’ve heard schools asking for a localised curriculum, but from an iwi level, it’s been working through what is it that we want everyone in this rohe [territory] to understand about the tangata whenua [people of the land] and what role has education got in that? Getting to a point where our kaumātua say we trust our kaiako [teachers]. Now we trust them to take this and not burn us with it because the whakapapa

[genealogies] and *pūrākau* [ancient legends] that have been shared in the past have been used against them.

Brent also appreciated the opportunity to see the “*bigger picture*” about why leaders make the decisions that they do. However, being privy to these insights had also created a challenge for him in his own school, making him wonder “*why do we do it that way? when other ways I have observed work so much better*” He wanted to be “*vocal*” about what he had observed but felt he needed to be “*very careful*” that his ideas did not then “*create more work for teachers.*” Accordingly, he saw the insights he gathered as a “*double-edged sword.*”

5.2.7 Challenges due to the AST Role.

Participants spoke about the different challenges they faced that had a significant impact on their ability to do their AST role effectively including the resistance to engage from others in the Kāhui Ako, the complexities of the AST role being a hybrid-fixed-term role, the contextual differences between Kāhui Ako, personnel stability and the consequences of a global pandemic.

5.2.7.1 Resistance to Engage and Lack of Commitment to Kāhui Ako Many of the participants were surprised by the varying levels of willingness of engagement and commitment by members of the Kāhui Ako. This lack of commitment from different groups, at times, was demonstrated by straight-out resistance, both passive aggressively and assertively. This resistance seemed to stem from competitiveness, suspicion and challenging kaupapa.

The principles behind, and the purpose, of Kāhui Ako are for educational institutes to collaborate in the best interest of the shared learners. Unfortunately, a significant barrier to engagement that the ASTs faced included the tension of competition in and between schools, barriers between the sectors and the perception that engaging with the Kāhui Ako team would result in more work and that the ASTs were there to “*spy*” and “*judge*” and then go back and report to the lead principal. These tensions were demonstrated by participants including Liam who found that the different primary schools in his Kāhui Ako were “*very competitive*” with each other. Scott also saw tensions relating to “*student retention*” with some full primary

schools (Y1-8) and a high school that started in Year 7, and he had observed “*a bit of a clash and the assumption that the high school is trying to pinch all of the year 7 and 8 students.*” As an AST, he believed it was part of his role to try and “*smooth that over*” and try to make “*transitions perfect*” and ensure people were not “*threatened.*” Keri and Henry also observed a “*them and us*” sentiment between primary and secondary schools. As ASTs, they had both worked hard at “*building rapport and trust*” and to show they had something “*valuable to offer*” while acting as a “*bridge*” between the different sectors.

In James’s experience in secondary schools, he had observed an internal competitive model. In his opinion, teachers were “*judged*” against their results and “*ying for numbers of students*” and therefore heads of departments were “*fighting*” to get the allocated PLD budget funding for the departments they were responsible for. He had found the “*competitive to collaboration*” a difficult paradigm-shift to navigate successfully in his AST role.

Aroha explained that in her Kāhui Ako some resistance was to be expected due to the nature of the culturally responsive practices work that her team of ASTs were tasked with, including “*opening people’s eyes to the concepts of racism, conscious and unconscious bias.*” In her opinion resistance was inevitable due to the “*nature of the kaupapa and mahi [being] confronting and challenging for people*” and if it wasn’t, then, as AST’s, they “*would not have been doing their job.*”

5.2.7.2 Principals All the participants saw that the effectiveness of the Kāhui Ako, and therefore their AST role, was most influenced at the principal level who needed to “*buy in*” and see it as “*important*” and a “*priority*” for there to be any traction. Most of the participants, like Scott, thought that “*collaboration would happen naturally*” as schools chose to be part of a voluntary initiative and therefore, they would be in the “*same waka [canoe] rowing the same way,*” yet that was not what always happened. Brent experienced a principal who particularly didn’t “*feel like they needed*” the other schools and just carried on with what they were doing making it “*quite challenging*” to interact with them. In Scott’s opinion only 50% of the primary

schools were on board in his Kāhui Ako. Additionally, at the high school, the principal “acted” like he was on board, but he didn’t really “back it up” and the other senior management at the same school were “completely against the idea.” Holly was “taken aback” in the first Kāhui Ako principal stewardship meeting she went to and came away thinking “why on earth are these schools together, they really don’t seem to want to work together?” She believed that the stewardship group was hypocritical due to principals who “talked about collaboration,” and expected their teachers to do it, despite it was “not what they necessarily model.” Holly used the analogy that “we are all supposed to be in the sandpit building a sandcastle, but you have leaders too busy building their own sandcastle.” In her opinion, they must stop talking about “my way” and that they have the “best school” and being “individualistic.” She stressed it had taken principals “a really long time to play together nicely.” Her Kāhui Ako was in its third year of operating and she was only now starting to see those “glimmers of hope” of collaboration and commitment. Also, at the steering committee level, Aroha witnessed principals all agreeing to a culturally responsive practice focus and dedicating four ASTs to this mahi (work). And yet, even though they had come together and made this joint decision, there were still principals within those schools “actively working against” and “blocking” the ASTs working with the WSTs and just “making it very, very difficult.”

This “blocking” of access to staff by principals was also a common experience for Brent, Scott, Holly, Keri, Susan, Daniel, and Hannah and included the WSTs, which made it very difficult to have an aligned vision of what the WST role alongside the ASTs and the overall Kāhui Ako did. Holly explained that, in her Kāhui Ako, it was made very clear from the beginning that WSTs “belonged” to their own schools and the schools were responsible for what they did. Eventually when her and the other ASTs were given permission to work in schools, they experienced barriers, being told “not now we are too busy, we will get you back to you,” which never happened. Keri shared that she and the AST team were told in “no uncertain terms” by a high school principal that the WSTs were “his” and several initiatives

were “*blocked*.” To counter this type of behaviour, Susan’s lead principal decided to “*protect*” the AST team from the principals who were considered to be “*threatened*” by them working alongside teachers. So instead, they took a different approach and organised for the students from across different schools to work with each other, accompanied by two teachers from each school which was successful.

It cannot be overstated how significantly those in principal leadership roles not only influenced how participants were able to do their role effectively but also influenced how others valued the AST role. Susan was at a conference and met a nationally “*influential*” principal leader from another Kāhui Ako who was “*very vocal*” about how “*aggrieved*” they were about not receiving many recent applications for a senior-leadership position they had advertised due to, in his opinion, the “*competition*” with Kāhui Ako roles that are “*overpaid*.” Susan was not only “*surprised*” by the “*insensitivity*” and lack of emotional intelligence of this principal speaking to someone in one of those “*over paid roles*”, it also “*worried*” her for the future of Kāhui Ako due to her believing that often the “*loudest voices get heard*.” Amira also explained that she knew of a potential AST candidate who “*withdrew*” their application as they decided they didn’t want the role after observing a principal “*actively pushing back*” at any Kāhui Ako involvement. This principal was heard publicly saying as far as he was concerned, at their school they were “*doing a great job*” and Kāhui Ako was “*wasted money*” and the potential candidate didn’t want to be “*up against*” that type of resistance.

5.2.7.3 Senior-Leaders The participants found other senior-leaders including DPs and APs the next-most challenging barrier to engagement, impacting significantly on how effective they could be in their AST role. Most of the challenges faced with these senior-leaders were associated with the ambiguity and lack of clarity of the AST role and professional jealousy. Many of the participants reported experiencing professional jealousy from their colleagues, especially those in senior-leader positions, while in their AST roles. As Henry stated, the remuneration and time allocation resourcing to do the AST role is “*second to none*” in

comparison to other roles, which is positive recognition of the importance of the role. However, for all the participants, it was “*problematic*” due to the resentment they perceived from others, which they viewed as a “*huge hindering factor*” to them being effective in their role.

5.2.7.4 Colleagues Apart from needing to navigate the challenge of resistant senior-leaders, ASTs also came up against resistance from colleagues including some who surprised them. Many of the participants believed a general negativity was present from the start due to the opposition to and “*narrative*” about Kāhui Ako by teacher unions that highly influenced their colleagues. Scott and James believed that they were up against “*wary*” colleagues who held the perception that Kāhui Ako involvement meant extra work or that they would be appraised by ASTs. In Jack’s context, his colleagues had the misconception that the ASTs were the “*spiral (of inquiry) police*,” and thought if the ASTs were invited into their school, it was because they had “*done something wrong*.” Consequently, his team of ASTs decided to change that perception by using the narrative that they were “*helpers*” and thought of ways they could utilise the WSTs to “*go between*” them and the teachers with the message of offering guidance and support, not judgement. Sarah shared that even when she did have the permission of the principals to go into other schools, the teachers would be “*suspicious*” of why she was there. So, she decided to ask the principals to be “*intentional about her purpose*” of being present in their schools and to communicate that to their staff before she arrived.

James explained that coming from a career of teaching a practical vocational subject, he had received a lot of “*ribbing*” from other teachers over the years and he had learnt to take it on the “*chin*.” However, his experience as an AST was “*not quite open hostility*” from his colleagues but they did not see the purpose of the role and had “*strong opinions*” on what he was being paid. He believed people are naturally “*suspicious*” and when they can not necessarily see you 2 days a week, they automatically think you are not doing anything. To mitigate this, James spent a lot of time getting to know people and reassuring them that he was not a “*threat*” and was there to provide a “*service*.” Susan was horrified when she was openly

questioned why she was paid so much to be a “*part-time teacher*.” Henry found it “*bizarre*” that teachers, not even from his school, thought it was appropriate to talk about how much he was getting paid and how it must be a “*cushy job*.” He had not observed the same behaviour with other leadership roles and believes this is because they are not new, and people are “*comfortable*” with the visibility they see of those leaders. In his Kāhui Ako, his colleagues had struggled to understand that his role requires him to be in other schools, so they won’t always see him.

Daniel and Henry spoke of more assertive resistance that was surprising and unexpected. Daniel was very disappointed when a colleague with whom he worked closely and respected, when referring to Kāhui Ako, said “*this too will go away and will just be another faded poster on the wall like PB4L* [positive behaviour for learning].” Henry explained a “*memorable moment*” for him was when he was:

Thrust into a room with 30 odd teachers I didn’t know because we had broken the whole Kāhui Ako into small groups and I had a few things to talk to and what I didn’t realise was that the feeling in the room was not that good towards the vision and direction of the Kahui Ako and our theory for improvement and a lot of teachers were feeling very threatened practically around dealing with issues of institutional racism and those sort of topics we were starting to put into the spotlight. I got a bit of an awakening with the hostile questions I was asked. I was not prepared for that. I thought it would just be a nice catch up with these teachers. I quickly realised that the AST roles come with a target.

James, Liam and Aroha experienced resistance from WST colleagues. James found the secondary WSTs less “*helpful*” and willing to work together than the primary WSTs who he believed were much more “*used to*” cooperating and were easier to engage with. One of the WSTs in Liam’s Kāhui Ako had been the previous and sole AST and Liam had “*won*” the position over them; there was an “*adjustment*” period with the change of status and role reversal,

and that friction impacted on Liam's effectiveness in his role. Aroha "*questioned*" why some of the WSTs in her Kāhui Ako were even appointed. In her opinion they "*took the money but were not in the waka [canoe]*," taking it further to say that they were not even "*dipping their toes in the water*" and consequently she observed a lack of momentum from those individuals compared to other WSTs whom she worked with.

Liam believed that, for him to be effective in his role, there needed to be stronger guidelines for the WST role. In his Kāhui Ako, he observed 50% of the WSTs had done minimal work and he did not believe it was an "*equitable workload expectation*" compared to other Management Unit (MU) holders. He had compassion for the plight of these WSTs and did not see the issue as their fault. He believed they needed to be "*guided*" too, because the job description was "*very ambiguous*," and that strong key performance indicators would be helpful for them to do their role and for him to support them to be successful. Emma also struggled with what her relationship with the WSTs was meant to be and so she proceeded with caution, thinking it was important to "*direct staff back to the WSTs*" so it didn't look like she was "*taking over their role*."

5.2.7.5 Kāhui Ako Community The resistance that Michael perceived came from the wider Māori community. His Kāhui Ako consisted of a mixture of English-medium schools and kura kaupapa Māori. As the sole AST, he was assigned the objective of developing a "*localised curriculum*." In his opinion, initially he was perceived as not the right person because he was not "*Māori enough*," even though he was of Māori descent. He explained it took a while to break down those barriers and get into schools and kura. He was surprised at the initial resistance; however, he was proud of the framework that was designed and the positive response from not only all the tūmuaki of the kura but also the kaumātua of the different iwi. Other challenges that the participants came up against was the ambiguity of the AST role variation in role expectations depending on the context, the complexities of being employed in a hybrid fixed-term role, the lack of induction support and a lack of sense of place.

5.2.7.6 Role Ambiguity and Lack of Sense of Place One of the overwhelming aspects that the participants were aggrieved by was the ambiguity of the AST role compounded by the lack of induction support to unpack what the AST role would entail in their context. This ambiguity was compounded by the lack of intentionally socialising to others the purpose of the AST role and where it fits with other roles. As aptly said by Mary “*with having no job description, it is like building a plane while flying it into an unknown flight path.*” And as Liam pointed out, for him the job description was “*very ambiguous,*” which, in his opinion, “*goes against the nature of most teachers who are creatures who appreciate firm parameters and certainty.*”

There was also a significant variation between what each of the participants were tasked to do in their AST role. Some were recruited into the tagged role as a specialist, which was also instrumental in some of the participants’ recruitment motivation as previously explained. However, others were “assigned” portfolios once they were employed, for example in Brent’s Kāhui Ako he was assigned with looking after the “*data,*” one of the other ASTs was assigned “*transitions*” and one was responsible for “*cultural responsiveness.*” Yet other participants were more “generalist” ASTs who were expected to work across all the achievement standard aspirations of the Kāhui Ako. This generalists aspect did lead to many of the participants expressing they then also had role ambiguity with their ASTs colleagues and struggled with “*finding their space*” alongside them, which impacted on how effective they were in their own roles.

The participants’ experiences of role ambiguity differed significantly from previous positional experiences. As a previous head of department, Natalie was expected to meet very “*definite deadlines*” and write reports with “*statistics that were measurable*” and, for her, this validated her effectiveness in that role. In contrast, she believed the AST role was “*pie-in-the-sky thinking, researching and contemplating*” before she could do anything “*tangible.*” Natalie, like all the participants, believed pressure from being asked role-clarification questions

constantly resulted in her feeling in a “*rush to prove and justify*” herself to others. With Natalie being a sole AST, she also felt very “*alone*” and was unsupported, left to figure it out by herself. Isabella had already been reluctant to apply for the AST role and had been convinced by others to do so. She was then “*disappointed*” and “*frustrated*” that, in her team of ASTs, none of them knew what they were meant to be doing and didn’t know what to say to people when they were asked. In Isabella’s opinion, it was other people who made her “*feel inadequate*.” James, like all the other participants, was of the “*understanding*” that, even though the recruitment process may not have given him clear expectations of the AST role, once he had been appointed, he would be “*governed*” by someone and given a “*clear job description or a brief to fill*.” He was under the “*illusion*” that the Kāhui Ako was something that all the principals had “*signed up*” for and therefore he would have everyone’s support and decisions had already been made on the areas he was expected to work on. Instead, his experience was one of “*now you have got the role what are you going to do?*” and he was expected to set the direction. Hannah described how she was initially attracted to the idea of “*pioneer innovation*” when applying for the AST role; however, in reality, without a clear job description, she believed she was “*bushwacking*” and not only didn’t know what she would find but also what she was meant to be looking for. She found this lack of clarity a “*roadblock*” especially when she was trying to work out where she “*sat*” with other roles, particularly senior-leaders such as a DP.

This sense of place and question of where the AST role fits was a common theme with all the participants especially in comparison with other traditional leadership positions, as demonstrated by this quote by Michael: “*You are kind of not in a leadership role in the sense of middle or senior-leadership management, but you are in a leadership position, it is hard to understand where you belong.*”

A number of the participants also spoke of the challenges of role clarification they had experienced with their colleagues in the already established traditional leadership roles such as DP and AP, SCT, SENCO and the more newly established leadership role of LSC. As has

already been presented, DPs and APs were either a positive or negative influencing factor over how effectively the participants of this study were able to perform in their AST role. Gaining role clarity and knowing each other's "*territories*" and learning how to complement each other were a "*steep learning curve*" for many of the participants. Daniel and Claire spoke of how they intentionally adopted strategies to be relational and inclusive of SLTs to support role clarification due to personal experience of "*lessons learnt*." Both included the relevant DP or AP when they had meetings with WSTs and were intentional in valuing their input. Oliver was in a Kāhui Ako that took longer to get started. He had heard from others there could be confusion in relation to role clarity. So, he "*took advantage*" of other people's experience and his autonomy as a sole AST and made sure he spoke with all the principals, DPs and APs about his role. He firmly believed that made a "*big difference*" to his effectiveness in his role. Hannah explained that as much as she "*dislikes*" that schools run on hierarchies, in her experience they do. So, there was a deliberate decision by her AST team to be "*transparent*" and to include all levels of leadership, especially the DPs, who in her opinion were "*very invested in the day-to-day running of their own school*" in all interactions.

Some of the participants, like Natalie, believed there was also a "*crossover*" with the SCT position due to both roles being tasked with "*working with and getting the best out of teachers*" so that they could "*get the best out of students*" so that "*students get the best out of the opportunities they are given*." These participants had a mixed experience with their interactions with SCTs and whether they came to a common understanding of each other's roles and how to work together.

Hannah, Lily and Amira were in tagged learning support AST roles. Even though it was socialised well that they were expected to work closely with other learning support roles, in practice they had very different experiences. Amira had found it "*tricky*" to know what each learning support role in her Kāhui Ako was meant to be doing and "*where one of them started and the other finished*." Lily struggled even within herself where the boundaries were and how

they “*blurred*” between when she was meant to be acting as the Head of Learning Support, as the SENCO or in her AST role. In contrast, Hannah explained that a big part of her AST role was to support the implementation of the new LSCs. She explained that her Kāhui Ako was “*deliberate*,” right from her starting in the role and then with the recruitment of the LSCs, in its intent to “*unpack and have a common understanding*” of how everyone would work together including LSCs, SENCOs, RTLB and her AST role.

5.2.7.7 Pressure to Prove Worth. The combination of role ambiguity, generous resourcing, professional jealousy, and a drive to be successful in the AST role compounded into feelings of accountability and an urgency to prove their worth to others for all the participants. Holly described an “*immense internal pressure*” due to the remuneration and time allocation of the AST role. In her opinion, teachers are “*hard workers, driven and are used to working at a feverish pace*.” When she started her AST role, everything was “*slow to get started*” and she attended “*many meetings, yet decisions didn’t really get made*” and this just compounded her feelings of accountability. Others, like Eve, relayed they believed external pressure from others to be seen to be “*busy and earning the money*.” Susan also believed in a “*great sense of accountability*.” Her experience was compounded due to the negativity she felt from her colleagues, leadership team and the board chair of her school who was of the opinion Kāhui Ako was a “*waste of money*.” Claire’s team of ASTs were constantly hearing from colleagues “*you get 2 days off*.” So, to mitigate that narrative, they decided to be more visible and transparent with schools including with the APs and DPs. They now have a full Kāhui Ako teacher only day once a year and network meetings once a term and have collective input, including student and whānau voice, into core documents that have been co-constructed. Daniel did share that, in his opinion, it was harder to be visible and make a noticeable impact in the bigger schools compared to smaller schools, where he believed he did get traction and was seen to be “*earning his crust*.” Isabella had a tough time proving her worth in her new AST role in her own school and found it easier to do so in the other schools. She believed that her own

school had “*pigeonholed*” her as they had not observed her “*full capabilities*” due to the fact most of her teacher-leadership experience had been in the UK before coming to New Zealand. She found this bias was compounded by limited office space at her own school and often she needed to work in the staffroom. She was “*shocked*” and “*offended*” when she heard on the “*grapevine*” that her colleagues were saying she was just “*sitting there drinking coffee and getting the big bucks while they were in the classroom doing all the hard work.*” When she relayed this to her lead principals, their suggestion was for her to work from home. As much as she was grateful for the support from her lead principals, it still conflicted with her feelings of being ostracised due to such a “*low-trust*” environment at her school. Aroha had other pressures due to identifying as Māori, as expressed here:

Being Māori and living in the Māori community our community expects a lot of me, even before I got the role. With the appointment to the Kahui Ako role a lot of our whānau over time we have an expectation that we will do well for our different iwi whanau. I feel that weight of responsibility.

The last category of challenges experienced by participants in their AST roles related to the policy intention of Kāhui Ako compared to the reality of the complex nature of implementation. These challenges included personnel stability, contextual circumstances of each Kāhui Ako, navigating the hybrid nature of the roles and the impact of the COVID-19 pandemic.

5.2.7.8 Personnel Stability Due to both general movement in the Aotearoa education sector’s employment market and the fixed-term nature of the Kāhui Ako roles participants were impacted significantly by other personnel changes within in the Kāhui Ako. This was especially disruptive if the personnel change impacted the level of leadership support, they received and the way they were expected to fulfil their roles. For example, Mary described the significant turnover of principals in her Kāhui Ako by stating that over a 5-year span there were only three principals left out of the original ten. One of those schools was onto their fourth principal and

this had impacted on the momentum and traction of her Kāhui Ako and her effectiveness as an AST.

Danel, Sarah and Keri also spoke of the challenges that occurred as a result of the change of lead principal and how that impacted on their effectiveness in their AST roles. Sarah was a sole AST and described how she had worked closely with her first lead principal and yet her new lead principal was much more “*hands off*” and she believed she lacked leadership support and needed to better understand what was expected of her, and how to manage her workload. Daniel described his first lead principal as someone who had given the team of AST “*agency*,” “*freedom*” and “*permission*” to work on initiatives together and set a strong foundation for their team. They had also “*fought*” with the principal group to have their full release time. This had now changed and was “*problematic*” since the change of lead principals, especially getting release time at the same time as an AST team, and they were much more “*fractionated*” and “*isolated*.” Keri believed her world had “*turned upside down*” due to her new lead principal deciding to adopt a new model to the previous lead principal and “*throw[ing] out*” how they had worked for the previous 2 years. Oliver’s role was impacted by the change from one lead principal to two co-lead principals and there had been a large turnover of WSTs. As the sole AST, he had been the only constant, and he felt a sense of responsibility to provide “*stability and momentum*.” Changing from one lead principal to two co-lead principals had been challenging for him. In his opinion, the first lead principal had given him a lot of “*autonomy*” and he believed they had worked as a “*team*”. Reporting to.” lead principals meant the dynamic had changed with co-leads and needing to get access to both “*slowed down the decision process*” get agreement from as making decisions as a committee will always be more time consuming.

5.2.7.9 Contextual Circumstances of Kāhui Ako A strong theme that came through the interviews with all the participants was that the AST role was interpreted and enacted very

differently in each context including an intergenerationally, approach with new ASTs replacing previous ones. This is demonstrated well by Susan:

I have seen ASTs who think they should be rushing into classrooms and fixing things, those that see themselves as statisticians and are there to collect the data, others who have a talent and a passion in one curriculum area and that is their role and I have seen those that sit back and not do a lot.

Brent, Scott, Isabella and Holly observed that the AST role did change due to the difference in goals and understanding between ASTs in their Kāhui Ako; which compounded not only the ambiguity of the role but also how they worked together as a team.

Liam was initially disappointed that he was not successful in gaining the AST role the first time he applied. However, he now saw that as a “*silver lining*,” as the first foundation ASTs were not very successful due to lack of guidance and support, and he would have “*suffered the same fate*.” There was still left over “*stigma*” from those initial ASTs, and he did explain he had to work extra hard to change that. Miles was also a second-generation AST. There were also issues with the original ASTs. In Miles’s opinion, they weren’t “*collaborative people*,” they did not have the “*respect and mana*” of those in other schools nor the “*visibility*” to make the role successful. He was “*relieved*” that the new group of ASTs he had joined were “*really strong*” and he could see why they got the role and it had been “*amazing*” how he had been “*embraced*” by others since he had started the role. Isabella was part of an intergenerational AST team due to two ASTs being reappointed from the first round and five being new. Amalgamating the team had been challenging, with the original two ASTs having a clear point of view of what the role should be and being quite “*set in their ways*.”

5.2.7.10 Hybridity of the AST Role The hybrid nature of the Kāhui Ako roles including the lead principal, AST and WST roles brought practical challenges, including balancing different responsibilities, job sharing and getting aligned release time, that impacted on the participants’ effectiveness in their AST roles. Participants spoke of the challenges of the

hybrid nature of the lead principal role and the “*monumental weight*” they had on them as well as running a school day to day. Brent had experienced both a lead principal who was not attached to a school and then dual lead principals, and he well and truly preferred to have an independent person who could dedicate their time and energy to the Kāhui Ako and the lead principal role. Sarah also spoke of the problematic practicalities of her Kāhui Ako, which was made up of mainly small rural schools across a big geographical area with a number of teaching principals, including her previous lead principal. Getting relief to cover leaders and teachers, including herself, to go to meetings had been challenging due to a small pool of relief teachers to call upon. Even when they could secure cover, they would often have to drive several hours each way to visit schools and meet in person.

Most of the participants (23 out of 28) held substantial responsibilities in their schools as well as the AST role. Michael, Claire, Brent, Keri, Lily, and Henry found doing “*justice*” to their classroom teaching and their other responsibilities very challenging. Claire needed to learn to “*differentiate*” and to say no so she could “*preserve time*” appropriately to be effective in her AST role. Keri struggled with the “*balance*” of her relationships constantly moving between being “*just a teacher*” and a leader in her school. Michael’s challenge with balance was due to giving “*equal resourcing*” and support to all the schools in the Kāhui Ako so as not to be seen as being “*biased*” towards his own school. Henry described being at an “*interesting point*” due to coming up to his 2-year reappointment stage and feeling unsure if he was going to reapply, due to the challenges with doing all roles well and missing the classroom and his students too much. Brent believed the disruption for his students was problematic as it was hard to build meaningful relationships if he was “*walking out of the classroom every 2 minutes*,” which, in his opinion, resulted in behavioural issues in his class. Another factor that Brent attributed to the behaviour issues of his class was the quality of the release teacher covering his class. He started with a person with whom he shared similar ways of teaching, and he could “*trust*” them in his absence. However, that person found other employment and there was a shortage of part-

time teachers in his area, and, in his opinion, they were “*scraping the bottom of the barrel*” to find someone. Finding the right person was a common challenge of job sharing for many of the participants. In Hannah’s opinion, ASTs needed to learn to be “*flexible*,” to try to align teaching philosophies with their co-teacher and communicate effectively so that the “*students don’t play one off for the other*.” As was also pointed out by Liam, the multi-role situation also extended to the WSTs. He explained that in his “*remote area, the professional pool is small and only one of the six WSTs is not a senior leader in their school already and are doing both roles including deputy principals, heads of departments and syndicate leaders*.”

5.2.7.11 Covid19 Pandemic. At the time the interviews were conducted, Aotearoa was locked down due to the COVID-19 pandemic, so this was top of mind for the participants. This was seen as both challenging and an opportunity for innovation to pivot from. COVID had impacted Miles due to all his hui (meetings) being conducted kanohi ki kanohi (face to face) at the marae (meeting ground), so they had been cancelled as it was not appropriate to continue virtually. In contrast, the lockdown had given James the opportunity to get more “*access*” to people online and gave him the opportunity to model online teaching techniques to his colleagues. Liam spoke of more long-term consequences of the pandemic and how he thought the AST role would need to pivot and evolve in the future as demonstrated with this quote:

Myself and the other AST are under no illusion that the AST role will need to change after lockdown because our previous spirals of inquiry will need to take a back seat to areas of hauora [wellbeing] and digital citizenship. We have learnt a lot about what students can and can’t do with a device. We had assumed a lot because they are always on devices. So as an AST team we have already been responsive and have offered workshops with teachers and our WSTs on how to upskill them digitally. All the ASTs have skills in these areas which is a bonus.

5.2.8 Participant Affirmation and Validation as ASTs.

A few of the participants did not feel appreciated and validated in their AST role. Liam believed that it could be a *“thankless job”* especially when he sent *“plenty of positive comms and good news stories”* and yet heard nothing back from the principals until there was a *“complaint.”*

In contrast, Mary, Aroha, Eve, Scott, Henry, Hannah and Lily in particular experienced affirmation and validation of success by observing positive changes due to their personal involvement. Their affirmations were gained by receiving positive constructive feedback from others and in turn experienced professional growth for themselves. These participants all found it satisfying that they were making a *“difference”* beyond their own school and were a *“person of influence”* across the Kāhui Ako.

Mary expressed that the AST role had so far been *“personally and professionally life changing.”* This was due mainly down to her observation of a *“change of hearts and minds”* with her colleagues from *“what can I get”* out of a Kāhui Ako to *“what can I bring to the table”* to share and collaborate with others. Aroha’s *“joy”* came from seeing the *“huge movement”* in the relationships that teachers were having with the students by going deeper than the *“surface level”* and challenging their own *“biases”* around gangs and poor families and thinking *“every Māori family was a gang family.”* Instead, she observed teachers seeing the *“richness in the other strengths that come as being part of a Māori whānau.”* She was proud of the part she and the other ASTs played in that change. Other participants spoke of the *“joy,” “excitement”* and *“pride”* they felt when they observed teachers’ they had worked with making progress. Eve explained how *“wonderful”* it had been for her to support a group of experienced teacher aides who she believed were *“loyal”* and had a *“love for students”* yet were often *“overlooked”* due to schools not always putting the time into developing them. In her experience, teacher aides were *“hungry”* for professional knowledge. Consequently, one of the teacher aides she had been supporting decided to do further study by way of a Ministry scholarship and Eve found that her involvement in that success was both *“rewarding”* and *“exciting.”*

In Scott's Kāhui Ako, they all got together at the end of the year and had a "*little show and tell*" with seminars to "*showcase*" teacher-led inquiries that the AST team had supported. He felt a sense of achievement and "*pride*" with the "*amazing*" progress that had been made towards improving student engagement and success. He did mention that any long-term sustainable change would take "*5 years*" or more to embed. Scott had experienced a substantial growth in his self-confidence with regard to supporting others with improving literacy results. He was initially not sure how much he could offer coming from a practical teaching subject, but he soon realised he was making an impact and being effective.

Henry emphasised how important it was for him and his fellow ASTs to make sure to "*celebrate*" developments and successes by platforming them for others to see. Hannah also experienced affirmation of success in her AST role when sharing with others due to being asked to present at different hui and national conferences. However, she did have a warning about protecting time. She explained as much as the positive feedback was "*nice*" to receive, her team did stop accepting invitations after a while as it was "*time consuming*" and they decided they needed to spend their "*energies internally*" on the "*job at hand*."

Lily had been "*reenergised*" and found the AST role interesting and enjoyable, especially observing the "*fruits*" of her "*labour*" come to fruition. She had found working with primary school teachers "*refreshing*" due to them being "*more open to things*" and a lot less "*cynical*" than her secondary colleagues.

5.2.9 Participant Advice for Teacher-Leaders in an AST Role

Participants did believe there were desirable personality characteristics and skillsets that a teacher-leader needs to possess and demonstrate to be successful in the AST role. These included the need to be relational, an effective communicator, collaborative; capable of building the capacity and capability of others; culturally responsive, credible, self-directed; to demonstrate emotional intelligence, be patient and resilient.

Having the know-how and disposition to build and sustain meaningful relationships was seen as the top priority to be successful in the AST role by participants – seeing relationships as “key” and understanding that they can take time to develop. For Susan, that meant spending the first 9 months building relationships with principals, senior leadership teams, and teachers. She believed the time taken to get to know people was “*vital*,” even though it could feel at times like no traction was being made her advice was do not be “*afraid to take that time*.” James explained the importance of building trust first and then making sure to “*backed it up*” with “*something to offer*.” Miles compared the AST role to being a “*consultant*” and having to “*earn*” his way in and build trust to get traction. Once he gained that trust, he created other relationships by taking “*great ideas*” with permission and sharing with others. Chloe expressed the importance of leveraging off relationships that were already established in her context, such as the WSTs who could “*relate*” to her in the AST role due to her previously having been an WST with them.

Being able to communicate effectively and the timing and tone of that communication were seen as important by participants. Emma, James, and Jack believed in the “*power of quiet*” by active listening is a crucial part of communication. Emma believed that “*everybody’s journey is different, and you need to be open minded and proactive in gaining information with probing questions to understand where they are at and what they need*.” James shared that probing questions could be “*how can we help?*” and “*tell us what you want us to do?*” Jack, reinforced the importance of “*thinking before speaking*.”

Chloe’s reflection on when she had been an WST there had been too many “*confusing*.” emails “*flying around*” by previous ASTs. So, her new AST team problem solved and decided that they would pair off and be responsible for a certain number of schools and be the liaison person and then share that back to the wider AST team in meetings. Liam and Susan also both believed a communication plan was vital to the success of the AST role. Susan’s AST team provided monthly updates in staff meetings and community notices sharing what they had been

doing. Mile's AST team also learnt the importance of reciprocal communication. They had set up a website and would also go into every staff room once a term and share what they had been doing and also in an effort to gain feedback. He was surprised how much "*PR*" was required and he felt at times like a "*travelling salesman*." In contrast Hannah saw public relations as a key part of the AST role. In her opinion AST's had to be "*passionate*" and be able to communicate and "*sell the vision*" to keep the "*buy-in*" and traction to keep everyone moving. She did share that she had needed to gain specific skills along the way to support her to do that. Brent explained that his AST team had to learn the importance of a communication plan the hard way. They now "*agonised*" over their messaging due to having upset some colleagues with previous communications that were seen to "*overstep*" onto others' territories and ask others to do something without prior consultation.

There was a strong emphasis from the participants on the need to be collaborative and build capacity in others to be successful in the AST role. Keri believed that often people saw leadership as "*hierarchical*"; however, she saw leadership as "*humans interacting and progressing an idea*" in a collaborative way. She saw the AST role as an opportunity to build others' capacity and "*give them more voice, recognise their passion allowing them the capacity to grow*." Scott had observed previous ASTs "*butt heads*" with senior-management due to those ASTs having a preconceived "*image*" of what needed to be done and lacking the ability to make "*concessions*" and work towards a "*blended image*" of the collective. He had learnt from this observation and had instead enacted his AST role very differently by approaching others with an "*inquiry*" and "*collaborative*" mindset. Claire believed that the "*brief*" of an AST is to "*coach and mentor*" others and to support developing the "*leadership and inquiry capabilities*" of those in WST roles. She described the skills she had learnt as a previous PLD advisor were in "*correlation*" and "*applicable*" to the AST role. As a PLD advisor, she had learnt about adult learning and how to "*walk alongside*" others in a "*collaborative*" way. In her opinion, people need to see Kāhui Ako as "*complementary to what they do and not as an add on*." Mary

reflected on how much she had grown as a teacher-leader and the paradigm shift she had experienced. Instead of thinking she needed to be the “*fountain of all knowledge*” and “*everything to everyone*,” she realised that she was not the expert and that she was actually “*amongst experts*.” She learnt to understand that her AST role was about “*building the capacity of others*” and to share their knowledge and give them “*agency*.”

Miles, Michael, Hoana, Aroha, Mary, Keri, and Lily stressed that to be a successful AST in an Aotearoa | New Zealand context then there is the need to be “*culturally responsive*” and be willing to model a “*personal journey*” of cultural competency to others. Mary believed that this is achieved by being a:

Champion of a te ao Māori world view and continuing to grow your knowledge base and skill set and most importantly share that journey with others to not only role model your own vulnerability as a learner but also validate cultural competency as a priority.

Lily expressed the importance of showing “*sensitivity*” to where people are on their journey and that being “*culturally responsive*” is about “*seeing where everyone is coming from and not just your own window on the world*.”

Credibility was deemed an important characteristic of an AST by participants. This credibility was seen as being gained in different ways including the “*professional knowledge*” that a teacher-leader held, the valuable contributions they had made and therefore the “*reputation*” they had in both schools and the communities that they lived in. Miles believed that ASTs needed to “*know their stuff, have a focus area*” and ultimately “*different areas of strengths*” contributed to a combined variation of strengths across the AST group. Henry also agreed that professional knowledge was important, and, in his experience, senior-leaders got “*caught up and under pressure to keep the cogs turning*” and there was not a lot of time for any of them for “*critical reflection nor engagement at a theoretical level*.” Instead, he thought the Kāhui Ako roles backed with a “*strong theory for improvement*” that was “*evidence based*” presented in a way of “*doing things differently*” moving forward could support senior-leaders.

James believed his credibility came from being able to “*use local knowledge to empower local people to achieve*” and Emma believed that, by being a long-standing member of staff in different leadership roles, she held a lot of “*professional mana*.” Jack believed his credibility and trust was due to the benefits of living in a small town and people knew each other through social, cultural, and sporting events. He had been involved in a lot of extra-curricular-activities so was able to “*foster relationships*” with teachers and principals along the way that he then called on in his AST role. For Scott, this confidence in his credibility was because he believed he was starting “*from a more advanced position*” due to his experience and “*advancements*” at previous large urban schools where “*10 years ago*” they had started the practices that were only now being introduced into his Kāhui Ako; he used the example of restorative practice.

Jack, Brent, and Sarah expressed the importance of being a self-starter as an AST including being “*super organised*.” Jack believed an AST needed to be prepared to be “*self-directed*”, use their “*initiative and time management*” and understand that the role is about “*improving and challenging yourself and what can we all do together*.” For Sarah, that meant she needed to “*step up*” and make her “*own way*” with her “*own ideas and suggestions*” due to in her opinion a lack of direction from leadership in her context.

Many of the participants spoke of the importance of and “*real need*” for emotional intelligence (EQ) in the AST role. Keri believed that EQ comes from “*understanding someone else’s perspective and where they are coming from and being open to new ways of doing things*.” Miles tried to demonstrate his EQ by first “*being vulnerable*” himself and by explaining he was “*not naturally good*” but had “*invested time due to the importance of the kaupapa*”. He also reassured his colleagues that by “*taking things slowly*,” at everyone’s own pace, then they would all achieve success together. Aroha saw EQ in the AST role as “*learning to know when to push and learning to know when to step back a bit*.” and by having “*empathy from seeing it from other people’s perspective, but also not letting that stop momentum so that don’t continue to perpetrate the current broken system for our Māori ākonga especially*.”

Emotional intelligence was something that participants also stated needed to be used reflectively by *“being kind”* to themselves and letting things go that were out of their control. For Aroha, being kind to herself was making sure she would *“stop, rest and sleep”* due to the AST role having *“a huge responsibility, personally, and also professionally to help the teachers and to help our education system grow to be able to accommodate it.”* At times, in the AST role, *“the goal posts constantly keep getting moved\and the amount of work keeps coming and can be quite draining.”* Aroha also explained, as Māori, she needed to be kind to herself as *“there will be things we don’t get there on, and there will be things that take longer and there will be things that we can’t wrap our heads around and that is okay.”*

Being able to “let things go” was another important mindset to adopt to be successful in the AST role. Lily said she would advise her former self to *“let go”* of some of the other roles she also held alongside the AST role, as part of establishing those clear boundaries, and to do so *“really formally and right at the beginning and be okay with making that someone else’s responsibility and be clear to others that I had moved on and that they need to see the other person”* and not her. Brent explained how he had needed to learn that trying to solve all the problems from the days he was on AST release time was *“drowning”* him and that he needed to leave *“the person that was there to solve it.”* This lack of control also extended, for Brent, to understanding that the AST team *“may have a timeline that doesn’t mean everybody’s got the same timeline and you can only do what you can do.”* This was the same experience for Mary who described herself as *“naturally a very concise person who needs clear expectations”* instead she *“had to learn in the AST role that is just not going to happen and that I can’t control everything and everybody.”*

Not being able to control everything and everybody and *“getting knocked back and things not going as they could or should”* meant that participants like Oliver spoke of the need for resilience. He believed that there had been times when *“it has been like trying to nail a poached egg to the ceiling due to dealing with different people’s views and opinions.”* Hannah

needed to “*rely on resilience to persevere*” due to demands on her had been “*taxing especially when working in the learning support sector.*” She had felt like she was being “*pulled in every direction due to so many stakeholders from agencies, to parents, to Ministry, to teachers and RTLBs [Resource Teachers: Learning and Behaviour].*”

Participants also explained that resilience was needed due to negative comments from colleagues and used expressions such as needing to “*grow a thick skin.*” Sarah explained that she tended to be a “*sensitive person and dislikes criticism*” and when “*dealing with so many different people with different perspectives,*” she needed to “*toughen up*” and understand that “*some of the things said were not personal.*” Scott also explained that he knew there was “*animosity about Kāhui Ako and the perception of added work when I was stepping into the role*” but he also knew that “*a culture takes time to change.*” He knew “*that it was going to be difficult at times and I would have to stay positive.*”

Daniel and Brent needed to learn to understand that decision making can take a long time with so many more people involved, and patience was the key. Eve was part of a faith-based Kāhui Ako and in her context she believed in actively role modelling the practice of faith as an AST with “*lots of prayer*” because that is who they were “*as a Christian network,*” therefore she liked to “*pray before meeting and pray as part of meetings.*”. Upon reflection, Eve would have also approached schools differently:

One of the hardest things was going into a school and saying, well, here I am. How can I serve you? And that wasn't really the right question to ask, I discovered, as I went on. The right question to ask was, here I am, can we sit together and look at this review document that I use. Can we sit down with your team and look at us? And get a sense of where your strengths are. What you're doing well and sense of your next steps.

Eve also suggested that it was important to get the approach right by having the “*structure in place first*” and “*that having that platform to start with some sort of review or scoping tool sorts*

out stuff that's not so helpful" including being asked "to do things that don't serve the purpose of the achievement challenges for the Kāhui Ako."

Participants would have also advised their former selves to "slow down" due to working "hours and hours" and to not go "quite so hard, quite so early." For Keri, this also meant she would advise her former self to set transparent and clear boundaries:

Around workload within the school. I would not have agreed to having relievers in my class instead of having less classes. Having a private office space, we have been thrown out of two and currently don't have one. Once again showing don't value the AST role.

Isabella would advise her former self and others that, when considering the AST role: *Be bold, take the leap of faith into the role. We talk about children having a growth mindset not all adults do. They can talk the talk and they can encourage their students, but they don't enact it themselves.* While Emillia advised a cautious approach, and that the AST role is "complex" and no-one should:

Hurry to try and do things and feel the pressure to act now. Instead take the time to get to know others and what they really need and for them to get to know you" and "try not to plan for everything because the most valuable time is the listening time, the experiencing time and the absorbing time and making sense of it later.

Susan shared that if she had her time again, she would have questioned her principal and board about whether she had their "genuine" support to do the AST role and would encourage others to "sense check commitment levels first". She believed they gave the concept of the Kāhui Ako and her role "lip service" but, in reality, she experienced a "constant wave of negativity" that "hit her hard" and impacted her effectiveness to do the role and her self-confidence.

5.3 The Core Essence of the Participants' Lived Experience

The participants as a group came into their new teacher-leader role from unique contexts nonetheless collectively brought with them a wealth of teaching and leadership experience. They were attracted to the AST role due to both extrinsic and intrinsic motivations. The collective spoke of an innate drive to enact positive change for the betterment of students' learning and wellbeing. They expressed a strong connection and alignment to the kaupapa, theory of improvement and potential of Kāhui Ako. Participants were optimistic from the outset, believing that there was a "place" for themselves in the wider Kāhui Ako professional ecosystem. The participants were all learning orientated and not only expected but welcomed the opportunity for PLD and growth due to the new teacher-leader role.

The NANP recruitment process had a profound impact and lasting impression on the genesis of their professional identity journey, including how they interpreted the AST role and the value they saw put on it by others. For the Māori participants, the recruitment process was Eurocentric and did not recognise or value a Māori world view on how leadership in a community is sourced. There was little-to-no planned induction for the participants into their new teacher-leader roles', leaving the participants to either "sink or swim." The reality of the AST role was at times surprising to them and nothing like anything they had experienced before, either positively or negatively. As a collective, the group's overall AST experience was highly susceptible to the conditions they found themselves in, especially the positive and negative influencing factors of the people they interacted with including those in positions of authority.

The participants' teacher-leadership experiences were both opportunistic and challenging. Opportunities included the benefits gained from networking, building powerful collegial relationships, sharing teaching practice and raising the profile of specialised subjects. There were participants who believed they were championed and supported in their role and yet also those who hit resistance from a range of colleagues and came up against barriers. These barriers

included lack of willingness to engage and resistance from others in the Kāhui Ako, ambiguity around their role and the complexities of being in a hybrid-teacher-leader fixed-term role.

The participants' collective overall experience had a profound impact on their professional identity development not only in relation to how they viewed their effectiveness in the AST role but also how those experiences shaped their future aspirations once the fixed-term AST role finished. Some saw themselves returning to a full-time teaching role and others intended to pursue further leadership development opportunities. However, they were all in agreement that even though the AST role had given them a lived experience of significant personal and professional growth, as a role it was not a sustainable alternative career pathway and instead led them back to the more traditional middle-leader and teacher-leader positions before they could consider advancement.

CHAPTER 6: Study Findings Alignment to Conceptual Frameworks

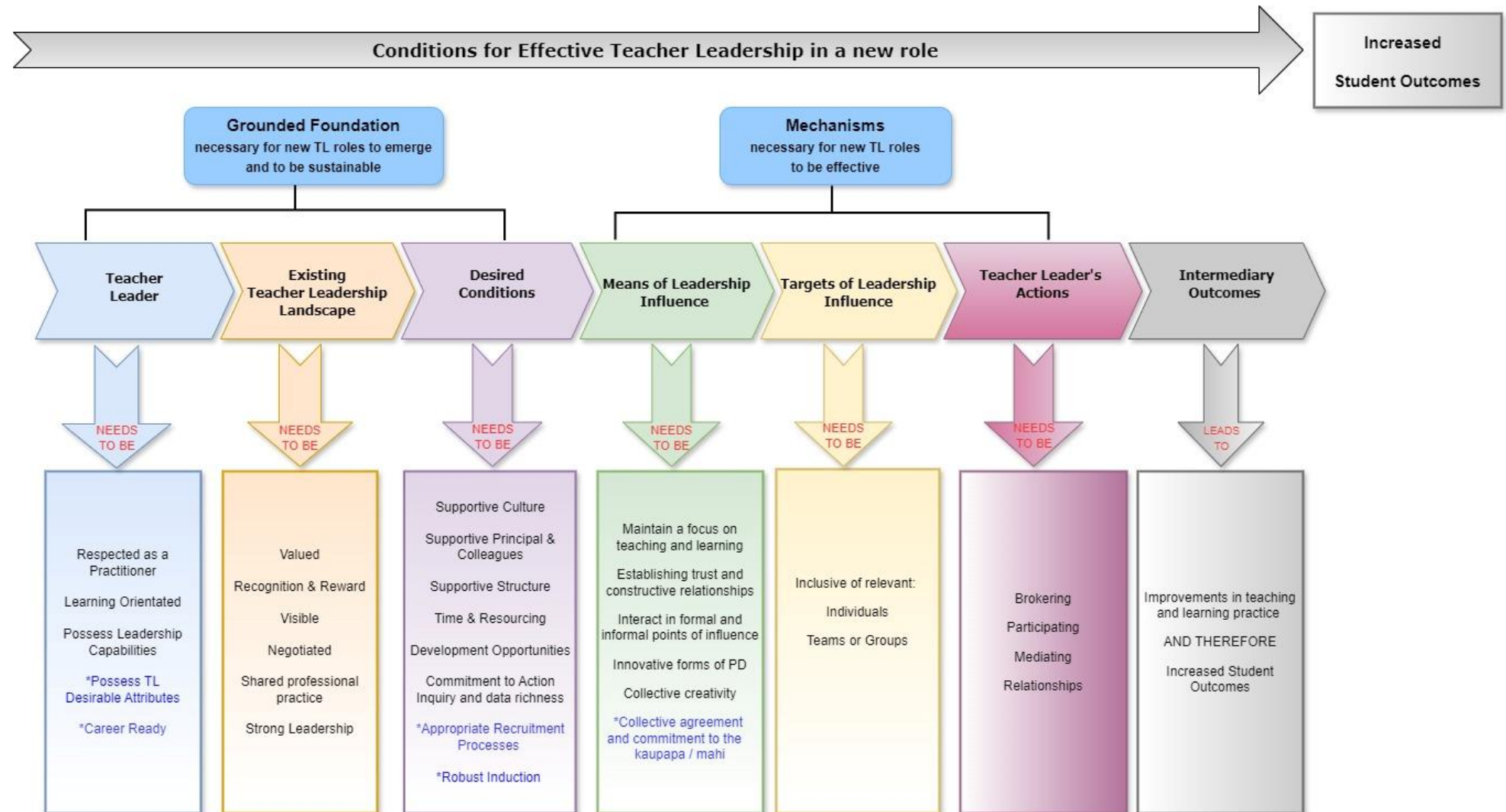
The overall aim of this study was to investigate the experiences of teacher-leaders within the Kāhui Ako government initiative and understand how their AST opportunity impacted their professional identity development. The data analysis and common themes that emerged from both Phase 1's questionnaire and Phase 2's phenomenological data explication process have been combined and backward mapped to the first iterations of the study's conceptual frameworks. Coding nodes could be backward mapped to more than one concept; however, for simplicity and discussion purposes, nodes were allocated to one "best" suited concept. This chapter will outline the expected and unexpected outcomes from that process.

The confirmation and, just as importantly, the absence of any concepts from the first iteration of the conceptual frameworks needed to be considered during the backward mapping process. The necessity of a concept in the final frameworks were considered due to both positive and negative participant experiences and the causal sequence impact across the framework. Subsequently, Figure 2.5: A Conceptual Framework for Teacher-Leader Professional Identity (pp. 70-71) did not need to be adapted; however, Figure 2.4: A Conceptual Framework for Teacher-Leadership (First Iteration) (pp. 64-65) was adapted as shown in Figure 6.1 (Second Iteration). Concepts with asterisks were added to the second iteration, these additions include:

- a distinction between leadership capabilities and attributes of a teacher-leader
- the importance of being "career ready" to undertake a new teacher-leader role
- the need for appropriate processes for recruiting new teacher-leaders
- the importance of a robust induction for new teacher-leader roles that includes the alignment and socialisation of new roles with others in the existing ecological professional landscape
- the need for collective agreement and commitment by all in the collaborative network such as a Kāhui Ako to the kaupapa (principles) and mahi (work)

Figure 6.1

A Conceptual Framework for Teacher-Leadership (Second Iteration)



6.1 Teacher Leader

This study confirmed a teacher-leader needs to be respected as a practitioner, have the desire to develop leadership skills, and the capacity to develop those skills to be successful (as presented in Sections 4.13.1 to 4.13.5, 5.2.9 and summarised in Table 6.2). There are however two additions. The first iteration of the conceptual framework for teacher-leadership focused on leadership capabilities of teacher-leaders to be successful in a new role. Conversely, the findings of this study strongly indicated there were also desirable personal attributes required to navigate their AST role successfully, consequently an adaptation of the original framework. The findings of this study also suggested participants needed to be *career ready* for the AST role for the opportunity to be a positive experience for them. Desirable SCA = Desirable Skills / Competencies / Attributes, PIF = Positive Influencing Factor, NIF = Negative Influencing Factor, RR = Recruitment Rationale

Table 6.31

Study Results Compared to Conceptual Framework: Teacher-Leader

Teacher-Leader	Textual theming category and subtheme	Total /157	%
Respected as a practitioner	Desirable SCA: Credibility, high trust	26	17
Learning orientated	RR: Using higher qualifications or PLD	9	6
	Desirable SCA: Knowledgeable/research backed	19	12
Possess leadership capabilities	RR: Role specific to skills e.g., collaboration	17	11
	RR: Role is a tagged position e.g., learning support	16	10
	Desirable SCA: Communicative	33	21
	Desirable SCA: Collaborative	29	19
	Desirable SCA: Able to build capacity in others	22	14
	Desirable SCA: Strategic thinking	17	11
	Desirable SCA: Highly organised, self-directed	16	10
	Desirable SCA: Culturally competent	11	7
*Possess teacher-leader desirable attributes	Desirable SCA: Relational	49	31
	Desirable SCA Resilience	13	8

	Desirable SCA: Adaptability	11	7
	Desirable SCA: Know how to let things go	10	6
*Career ready	RR: Opportunity existed that was something different	22	14
	RR: Previous experience as a WST	11	7
	RR: Future career opportunities	16	10
	RR: Leadership experience	17	11
	RR: An opportunity to enact change	29	19
	RR: Kaupapa aligned with self	23	15
	RR: Existing involvement in Kāhui Ako/community	18	12
	RR: Networking connections: Existing and creating new	28	18
Results from Phase 2 that were not present in Phase 1		Total /28	%
* Possess teacher-leader desirable attributes	Desirable SCA: Patience	11	39
	Desirable SCA: Sensitivity/EQ/empathy	8	29
	Desirable SCA Confident	5	18
	Desirable SCA: Positivity	5	18

6.1.1 Teacher Leadership Capabilities versus Attributes

Leadership *capabilities* and *attributes* are closely related but have been argued to refer to different aspects of leadership.

6.1.1.1 Capabilities. Robinson (2010) used the term leadership capabilities to describe “what people need to be able to do and to be, to carry out a particular function” (p. 3). She employs the concept of “capability” rather than “knowledge, skills, and dispositions” due to recognising “school leadership involves a seamless and dynamic integration of knowledge, skills, and personal qualities” (p.3). Robinson gives the example of teacher feedback that might be categorised as a skill, yet it involves knowledge (knowing what to say about the quality of teaching), skill (knowing how to say it), and deeply personal qualities such as open-mindedness and good intent. She cautions that when the three components are separated out, “an immediate disjunction is created between the leadership specification and the integrated reality of leadership practice” (Robinson, 2010, p. 3). Capabilities are typically learned and developed

over time and leaders can work on improving these capabilities through training and practice. Leadership capabilities are often tangible and observable, and they can be measured and assessed to some extent (Mencel et al., 2016). Furthermore, Danielson (2006) stated that teacher-leaders need facilitation and group processing skills, such as listening, honouring other people's ideas and joint problem-solving skills. This was not only evident in the research narrative in the participants' descriptions of their work with colleagues but also especially evident for those ASTs that were in a Kāhui Ako that had more than one AST and they needed to work together as a team. As shown in Section 4.13.5 from the perspective of the participants of this study the top three most important capabilities of an AST were the ability to be able to communicate followed by the ability to be collaborative and the ability to build capability in others. Being a strategic thinker, highly organised, self-directed, and culturally competent were also mentioned as important capabilities.

6.1.1.2 Attributes Are the personal qualities, characteristics, and traits that leaders possess naturally or develop over time such as integrity, empathy, resilience, humility, charisma, and emotional intelligence (Mencel et al., 2016). Attributes are often inherent or intrinsic to an individual's personality, and they play a significant role in shaping a leader's style and approach. Leadership attributes are often subjective and qualitative, making them harder to quantify or measure objectively (Mencel et al., 2016). Lewthwaite's (2006) found the personal dispositions of commitment and interest were either a contributor or impediment to teacher-leader development. Jacobs et al. (2016) stated the attributes necessary for successful teacher-leaders include the ability to work collaboratively with others, commitment to their work, innovation, being organised and demonstrating ethical behaviour. Finally, according to Lumpkin et al. (2014) effective teacher-leaders possess personal social attributes, can demonstrate emotional leadership, have the ability to manage oneself as well as personal and professional connections with colleagues. These researchers further state that teacher-leaders who possess emotional leadership expand not only their personal but also their peers' expertise

in the following four domains of emotional and cognitive self-awareness, self-control, social awareness and the ability to be able to guide and motivate with a compelling vision (Lumpkin et al., 2014). From the perspective of the participants of this study the top three most important attributes of an AST were the ability to be relational, followed by being resilient, adaptable and the ability to let things go. The 28 participants in Phase 2 also expanded the importance of being patient, demonstrating emotional intelligence, being confident and the need to have a positive attitude.

In summary in the second iteration of the teacher leadership framework as shown in Figure 6.1 (p. 207) *leadership capabilities* refers to the specific skills and competencies that teacher-leaders acquire through training, education, and experience. Whereas desirable *leadership attributes* are the personal qualities and characteristics that contribute to a teacher-leader's effectiveness and influence. The importance of teacher-leaders being *career ready* to undertake a new role has also been added to the second iteration and is presented next.

6.1.2 Career Ready

Career ready is inclusive of two aspects, firstly, the teacher-leader needs to be motivated to fully embrace a new role and, secondly and just as importantly, be ready to move away from their previous positioning and embrace transitioning to a new identity.

6.1.2.1 Teacher-Leader Motivation. The participants in this study reported they were initially motivated by both extrinsic and intrinsic motivations to apply for the AST role. As presented in Section 4.2, 71.4% ($n = 110$) of the participants' rationale for applying for the AST role was a *career choice*. Further explanation was provided in the additional comments sections including participants believing the AST role was an extension to work they were already doing, an opportunity to enact meaningful change and network with new people, a personal alignment with the kaupapa of the Kāhui Ako policy, a desire for a new career challenge that would provide leadership experience and lead to potential future career opportunities. Similarly, a study by Margolis and Deuel (2009) found that teacher-leaders were motivated by moral

imperatives as well as monetary rewards. The monetary motivation was not overtly expressed by participants in this study as a key motivation, although some ASTs commented on their appreciation for the financial recognition. Championing by mentors to apply for the AST role also supported participants to be career ready. This study revealed 12% ($n = 19$) of the participants appreciation of champions who encouraged them to apply for the AST role. “Shoulder tapping” as a teacher progresses in their career is a common occurrence (Lumpkin, 2016).

Any initial reluctance to apply for the AST role was due to participant’s concerns with time away from the classroom and embracing the unknown. There were participants ($n = 19$) who expressed they were initially hesitant to apply for the AST role when it was first advertised due to their reservation of being away from their classroom two days a week and what that would mean for their students. Crowther et al. (2009) found in their discussions with potential teacher-leaders they heard frequently “I just want to teach; I don't want to be a leader” (p. 35). Teachers can also be reluctant to accept the title of teacher-leader because their colleagues may interpret the position as an administrative role (Katzenmeyer and Moller, 2009). The unknowingness of something new and not wanting to be the first to take up a brand-new role was also expressed by some participants and therefore they intentionally waited to see how the role would develop to gain insights from observing the implementation by the other AST pioneers. The second part of being *career ready* relates to teacher-leaders being prepared to embrace transitioning to a new identity.

6.1.2.2 Embracing Transitioning to a new Teacher-Leader Identity. The introduction of a new policy such as Kāhui Ako brings change and the need for the participants of this study to transition to their new AST role. Bridges and Bridges (2019) stated a distinction between *change* and *transition*. Change being external, situational, outcome based and may require an individual to learn a new system or practice. Whereas transition is an internal psychological process that includes the “inner reorientation and self-redefinition that you have

to go through in order to incorporate any of those changes in your life...unless transition happens the change work will not be successful” (p. 4). Furthermore, William Bridges developed an identity transition conceptual framework in the 1970s and described the three stages of transition as 1. the ending of something familiar, 2. the neutral zone of disorientation and 3. the beginning of something new. He emphasized that the stages do not have clear boundaries, instead overlapping and experiencing elements of more than one phase at any one time (Bridges & Bridges, 2019).

Even though a total of 80% ($n=109$) of the Phase 1 participants self-identified that they felt validated in their role and that they and others saw them as an AST and had therefore successfully transitioned it is important to note that those results are from only one question in Phase 1 and gained from only one perspective. Other evidential findings across both phases of the study would lean more towards an even spread of participants across all three transitional stages. The inclusion of *career ready* in the second iteration of the conceptual framework is due to a teacher-leader embarking on a new role will only move through transition phases by acknowledging, experiencing and addressing the elements associated with each phase as reorientation, relearning and renewal (Ritchie, 2023). Moreover, “one’s ability to successfully navigate a career transition depends more on one’s ability to manage ‘being new’ than on being technically competent” (Manderscheid & Davidson, 2016, p. 95).

6.2 Existing Teacher-Leader Landscape

Participants confirmed that the existing teacher-leader landscape needs to be visible, valued, recognised, rewarded by others, have strong leadership, be continually negotiated through feedback and evaluation, and distributed within the professional ecological landscape through shared professional practice (As shown in Phase 1 and 2 results presented in sections 4.13.3 and 5.2.8, and summarised in Table 6.3). AOS = Affirmation of Success, LAOS = Lack of Affirmation of Success, PIF = Positive Influencing Factor, NIF = Negative Influencing Factor.

Table 6.32*Study Results Compared to Conceptual Framework: Existing Teacher-Leader Landscape*

Existing TL landscape	Textual theming category and sub theme	Total /157	%
Valued	AOS: Feedback and validation	32	20
	LAOS: Negative experience	16	10
Recognition & reward	AOS: Reappointment process	8	5
Shared professional practice	Opportunity: Contextual sharing of practice	32	20
Visible (socialisation)	AOS: Impact and change	81	52
	Challenge: AST role contextual	20	13
Strong leadership	Challenge: Lack of leadership guidance and support	12	8
Negotiated through feedback and evaluation	PIF: Reappointment process - reflective	8	5
	NIF: Reappointment process not reflective	18	12
	AOS: Enjoyment, confidence, growth	71	45
	AOS: Feels like a good fit	10	6
Results from Phase 2 that were not present in Phase 1		Total /28	%
Shared professional practice	Opportunity: Raising profile of specialised subject	5	18

6.3 Desired Conditions

Participants confirmed the desired conditions needed to be effective in their AST roles included a commitment to action inquiry, data richness, a supportive culture, the need for structures for teacher-leaders to be provided the time, resources, and opportunities to do their role and develop as professionals (Sections 4.13.2, 5.2.3, 5.2.4 and summarised in Table 6.4). Two aspects that were evident in the study's findings and consequently added to the second iteration were the need for an appropriate recruitment process and robust induction due to the newness, contextual and complex nature of the AST role. The absence of a robust induction programme coupled with a lack of socialisation of the AST role, within and across the Kāhui Ako, resulted in challenges that the participants needed to navigate. These challenges impacted the participants' effectiveness to do their role, and negatively impacted their professional identity development.

PIF = Positive Influencing Factor, NIF = Negative Influencing Factor, RR = Recruitment Rationale.

Table 6.33*Study Results Compared to Conceptual Framework: Desired Conditions*

Desired conditions	Textual theming category and subtheme	Total /157	%
Supportive culture	Challenge: Proving worth to others	35	22
	RR: Championed to apply	19	12
Supportive principal and colleagues	PIF: Lead principal(s)	70	45
	NIF: Lead principal(s)	7	5
	PIF: principal	30	19
	NIF: Employing principal	13	8
	PIF: Other principals and SLs	33	21
	NIF: Other principals and SLs	12	8
	PIF: Colleagues in other roles	16	10
	PIF: Other ASTs	62	40
	PIF: WSLs	16	10
Supportive structure	Challenge: Hybrid model: Role responsibilities	25	16
	Challenge: Release timetabling aligned	29	19
	Challenge: Personnel stability	32	20
	Lessons learnt: Structured support and boundaries	11	7
Time and resourcing	Opportunity: Dedicated release time to perform role	31	20
	Challenge: Job sharing for AST release	8	5
	Challenge: Professional jealousy	16	10
Development opportunities	Opportunity: PLD opportunities and growth	43	27
Action inquiry and data richness	Opportunity: Transitions: Sharing data	13	8
<i>*Appropriate recruitment processes</i>	PIF: Process affirming	21	13
	NIF: Process NOT affirming	37	24
	PIF: Process supported understanding	2	1
	NIF: Process did NOT support understanding	25	16
<i>*Robust induction</i>	Challenge: Role clarification: with other ASTs	8	5
	Challenge: Lack of leadership guidance and support	12	8
	Challenge: Role clarification: role ambiguity	63	40
	Challenge: Role clarification: with WSTs	14	9
	Challenge: Role clarification: with colleagues	17	11
Results from Phase 2 that were not present in Phase 1		Total/28	%
Supportive structure	Challenge: Hybrid model: Lead principal role	3	11
	Challenge: Hybrid model: Student relationships	5	18

In the next chapter Section 7.6.1 discusses in detail the importance of appropriate recruitment processes and 7.4.3 outlines the needs of a robust induction processes for new teacher-leaders.

6.4 Means of Leadership Influence

Participants confirmed the importance of maintaining a focus on teaching and learning, the need for innovative forms of professional development, collective creativity, establishing trusting and constructive relationships by building influence in both formal and informal situations, and honing their skills through collaborating routinely with peers and administrators as means of leadership influence (see Table 6.5). PIF = Positive Influencing Factor, NIF = Negative Influencing Factor

Table 6.34

Study Results Compared to Conceptual Framework: Means of Leadership Influence

Means of leadership influence	Textual theming category and subtheme	Total /157	%
Maintain a focus on teaching and learning	Challenge: Kāhui Ako intention vs reality of implementation	25	16
	Challenge: Different dynamics and perspectives	11	7
	Challenge: Resistant colleagues	34	22
	Challenge: Resistant principals	47	30
Establishing trust and constructive relationships	Challenge: Resistant senior-leaders	26	17
	Challenge: Resistant WSTs	6	4
	PIF: Iwi and hapū	7	5
Formal / informal influence	Opportunity: Networking existing and new	57	36
Innovative forms of PLD	NIF: PLD advisor	4	3
	PIF: PLD advisor	28	18
Collective creativity	Opportunity: Gaining insights: wider perspectives	29	19
Collective agreement and commitment to the kaupapa / mahi	Challenge: Willingness to engage	55	35
	Challenge: Collective agreement kaupapa / mahi	25	16

In the next chapter Section 7.4.2 discusses the significance a collective commitment and agreement on kaupapa (principles) and mahi (work) of a new initiative

6.5 Targets of Leadership Influence

Compared to other teacher-leader roles, the AST role is unique due to the vastness of the targets for leadership influence that extends beyond their own organisation and includes institutes on the educational spectrum from early learning through to secondary education. In this study the main group the ASTs interacted with was those in official Kāhui Ako roles including the lead principal, other ASTs, and WSTs. Generally, the ASTs also interacted to a lesser degree with the stewardship group of their Kāhui Ako facilitated through the lead principal, which was mainly principals; however, some Kāhui Ako also included DPs. The findings of this study affirm the need for the inclusion of this aspect of the framework due to different institutes' leaders dictating which people the ASTs were able to interact with and therefore influence. This especially included the access to other Kāhui Ako roles such as WSTs. AST influence ranged significantly from those ASTs who were allocated WSTs as their responsibility to coach and mentor, to those who were denied access by a school's principal or SLT.

6.6 Teacher-Leader Actions

The concepts of brokering, participation, mediation, and relationships were specifically explored in the Phase 1 questionnaire and those findings are presented and discussed in Section 4.6. Even though there were comments from participants about the use of the terminology, over all the findings affirm the inclusion of these concepts in the framework.

6.7 Intermediary Outcomes

More than half of the participants (52%, $n = 81$) referred to the impact and change in outcomes they had observed due to being part of the Kāhui Ako; the themes of this impact included the following: making connections and building relationships in and across learning institutions ($n = 27$) and with the wider community ($n = 11$), sharing of contextual practice ($n = 17$), improved transitions for learners ($n = 7$) and the movement and acceptance of the AST role in the wider professional ecological landscape ($n=9$). It is important to note there was limited evidence, other than anecdotal, referring to Kāhui Ako achievement challenge documents, of intermediary

outcomes that improved teaching and learning which resulted in high levels of student learning and achievement which is an interesting finding considering this was a key rationale behind the policy and the significant financial investment by the government.

6.8 Chapter Summary

The outcomes of this study included expected and unexpected findings. The expected findings supported the concepts outlined in the first iteration of the frameworks including concepts related to the grounded foundation required for teacher-leaders to emerge and be supported in their new role and the mechanisms for teacher-leadership to be effective leading to the goal of increased student outcomes. These expected outcomes included:

- A teacher-leader needs to be respected as a practitioner, have the desire to learn leadership skills, and have the capacity to develop those skills.
- Leadership needs to be valued by their peers, recognised and rewarded, visible in the school, have strong leadership, continually negotiated through feedback and evaluation, and distributed among teachers through shared professional practice.
- The desired conditions need to include a commitment to action inquiry and data richness; have a supportive culture within the school that supports teacher-leaders and senior leadership; have supportive structures; colleagues who encourage leadership; and the time, resources, and opportunities provided for teachers to develop leadership skills.

Consequently, when the teacher-leaders emerge from this grounded setting, they can then use the mechanisms of:

- Influencing leadership by maintaining a focus on teaching and learning, innovative forms of professional development, collective creativity, establishing trusting and constructive relationships by building influence in both formal and informal situations, and honing their skills through collaborating routinely with peers and administrators.

- Targeting individuals, teams and groups that influence and contribute to improved teaching and learning by utilising the teacher-leader actions of brokering, participation, mediation, and relationships.

The unexpected findings and consequently the conceptual additions and adaptations made to the second iteration of the conceptual framework for teacher-leadership included:

- a distinction between leadership capabilities and attributes of a teacher-leader
- the importance of being “career ready” to undertake a new teacher-leader role
- the need for appropriate processes for recruiting new teacher-leaders
- the importance of robust induction of new teacher-leader roles that includes the alignment and socialisation of new roles with others in the existing ecological professional landscape
- the need for collective agreement and commitment by all in the collaborative network such as a Kāhui Ako to the kaupapa (principles) and mahi (work)

The next, and final chapter, presents a discussion and recommendations of this study including empirical evidence to support the inclusion of the additional concepts as presented in this chapter.

CHAPTER 7: Discussion and Recommendations

This chapter evaluates the findings of this project in relation to the existing literature and explains how this study adds to the international literature knowledge on teacher-leaders, teacher-leadership, professional identity development and educational communities of learning (Bell et al., 2022). The key findings of this study explained how and why the Kāhui Ako policy's intention to provide teacher-leader opportunities with a focus on improvement efforts for learners through a government initiative was willingly embraced by participants. However, as demonstrated in this study government reform-initiated teacher-leader roles once introduced are dependent and significantly influenced by the complex nature of the professional ecological landscape within which they operate (Pugh & Zhao, 2003). The controversial and complicated nature of the Kāhui Ako reform meant that the AST participants were subjected to both a high degree of *distance* and *dependency* complexity. In educational reform “distance refers to how much the innovation deviates from the existing school culture and practices. Dependency refers to how much the innovation relies on other people and resources, particularly those resources beyond the innovator's immediate control” (Pugh & Zhao, 2003, p. 199). To demonstrate these findings a social ecological framework is used.

7.1 Social Ecological Model Theory

Social ecological model (SEM) theory, also known as ecological systems theory, is a framework used to understand how different social and environmental factors interact to influence human behaviour and development (Bone, 2015). The theory was developed by Russian born American developmental psychologist Urie Bronfenbrenner in the 1970s and has since been widely used in various social sciences fields (Bronfenbrenner, 2000). Social ecological model theory has a “long-standing background, drawing from both public health and psychology fields” (Quintiliani et al., 2010, p. 188). However, the importance of ecological models in the social sciences is that “they view behaviour as being affected by and affecting

the social environment” (McLeroy et al., 1988, p. 355). The findings of this study show that the AST role both impacted and in turn was impacted by the Kāhui Ako social environment.

According to Bronfenbrenner (2000), an individual's development and behaviour are shaped by multiple levels of influence, ranging from the individual level to broader societal and cultural factors. These levels are organised into five interrelated systems in a SEM, including:

- Microsystem refers to the immediate environment in which an individual lives and directly impacts their development, such as family, school, peers.
- Mesosystem refers to the interactions and connections between different microsystems, such as the relationship between family and school.
- Exosystem refers to the broader societal and cultural factors that indirectly influence an individual's development, such as government policies, mass media, and social norms.
- Macrosystem refers to the larger cultural and societal context in which all the other systems are embedded, such as beliefs, values, and customs.
- Chronosystem: refers to the pattern of environmental events and transitions over the life course as well as changing socio-historical circumstances, such as the increase for women to pursue a career during the last thirty years (Bronfenbrenner, 2000; Zavelevsky & Lishchinsky, 2020).

Over time, Bronfenbrenner's SEM has been broadened by researchers to help understand the multifaceted and interactive effects of personal and environmental factors that determine behaviour in various fields (Zavelevsky & Lishchinsky, 2020). Consequently, researchers from different research areas elicit from Bronfenbrenner's original model a new model with new interpretations and definitions of the subsystems around the individual depending on the study context. According to Bronfenbrenner (2000) himself, “we have arrived at a point where the concerns of basic developmental science are converging with the most critical problems we face as a nation” (Bronfenbrenner, 2000, p. 133).

Lewthwaite (2006) and Smith et al. (2017) used an adapted version of Bronfenbrenner's model in their studies of teacher-leaders. Smith et al. (2017) recommended that:

Those who work in teacher leadership – practitioners and researchers alike – would do well to heed Bronfenbrenner's call to adopt an ecological systems perspective. Doing so has the potential to move the field forward toward a comprehensive theory of teacher-leadership, something it currently lacks. For those who train and support instructional teacher-leaders, the framework offers tools for doing each aspect of this work more effectively by acknowledging and accounting for the multiple facets of this complex social phenomenon. (p. 284)

Lewthwaite (2006) stated a teacher-leader's development is best understood as a joint function of the characteristics of the person and the environment and the “interplay” between these factors are either risks or supportive factors contributing to or impeding development (p. 331). The interactions between these interrelated systems and the way they influence an individual's development and behaviour are complex and dynamic. It is important to acknowledge that the factors that influence development are unique to each individual, their personal attributes, the context in which their development takes place, the time (lifespan) at which the development is occurring, and the processes each person experiences (Bronfenbrenner, 2000). However, with that generalisation caveat taken into consideration, understanding the critical nature of how an ecological landscape functions is important for creating effective schooling interventions and programs through government policies like Kāhui Ako (Lewthwaite, 2006; Smith et al., 2017). The findings of this study clearly revealed a multi-million-dollar government reform policy was designed and implemented with little cognisance of the New Zealand educational ecosystem at the time of implementation nor the implications it would have on the education professionals involved in the initiative. To demonstrate these findings adaptations from Bronfenbrenner's ecological systems model theory has been utilised as shown in Figure 7.1.

Figure 7.1

Social Ecological Model (SEM) for this Study*



Intrapersonal: Teacher-Leader's (TLs) characteristics including gender, age, ethnicity, professional knowledge, leadership practices, skills, beliefs, and motivations.

Interpersonal: TLs relationships with others e.g., students, colleagues, and senior-leadership.

Organisational: TLs sense of place in the organisation and their interaction with the social norm rules, regulations, and rhythms of their own place of work and the other Kāhui Ako members' places of work e.g., schools, kura and early learning centres.

Community: The TLs relationship with the wider community including whānau (family), hapū (sub-tribe) and iwi (tribe), professional development advisors and government officials.

Policy: The socio-cultural aspects within which the TLs function including government policies and regulations e.g., Kāhui Ako reform policy, Teacher Collective Agreements, NANP recruitment guidelines.

* Adapted from Zavelevsky and Lishchinsky (2020) ecological emergent model for teacher retention which is an adaptation from Bronfenbrenner's (1979) ecological social model.

7.2 Intrapersonal

This part of the SEM relates to the significance of the teacher-leader's characteristics including gender, age, ethnicity, professional knowledge, leadership practices, skills, and motivations.

7.2.1 Intrapersonal Complexity of this Study

One factor that contributed to the uniqueness and complexity of the AST role compared to other teacher-leader positions created through government legislation described in the literature was the significant variation in context. Even though the participants shared the title of across-

schools-teacher and were all eligible for the same time allocation and remuneration, every participant's context was unique, especially in relation to how the AST role was interpreted and enacted within their SEM. This variation occurred mainly due to the number of different institutions within the educational spectrum ranging; from early learning centres, primary, intermediate, secondary, and special schools where the participants were both primarily employed and were also required to engage and influence. Furthermore, compared to other teacher-leader studies in the literature the participants of this study also differed from each other in their previous teacher-leadership experience. Participants did not all have a background in a specific curriculum expertise or teaching of a specific age group, gender, or special character such as, Catholic education. Additionally, the AST role was experienced very differently for those that were in a sole AST role compared to those that were part of a larger team of ASTs in a Kāhui Ako. Added to the complexity, instead of relinquishing other leadership responsibilities upon being appointed into the AST role 93% of the participants ($n = 137$) were expected to continue working in both roles. The reasons for AST's not relinquishing their substantive role related to personal preference of ASTs, SLT expectations and limited professional capacity to backfill their existing position. Nevertheless, the unrealistic demands placed on the participants took a significant personal toll. Additionally taking on an AST alternative leadership opportunity but then not relinquishing previous opportunities for others to benefit from was not the original intention of the policy. The contextual variation is important to emphasize due to the implications of *one size fits all* teacher-leadership government policies like Kāhui Ako. Moreover, for teacher-leadership to be successful it has to be a carefully orchestrated and deliberate process (Muijs & Harris, 2006).

7.2.2 Teacher Leaders as an Expert in Conflict with Humility

In this study participants had a mixed view regarding the extent to which the AST role should be regarded as an expert or not. As previously stated, the genesis of the AST role had the original term *expert teacher* proposed by the government that was rejected by the teacher unions

in the Working Group (Section 1.5.3.5) and replaced with across-schools-teacher. There were also participants in this study who struggled with the use of the term expert. The hesitation participants had of being viewed as an expert revealed both an intrinsic way of thinking about themselves as a professional educator as well as a philosophical view of how the ASTs role should be operationalised. Participants expressed their personal beliefs related to humility, discussed their apathy for elitism and preferred to describe themselves as an “expert amongst experts”.

Thirteen of the 24 (54%) Māori participants commented on the cultural conflict they had with “blowing their own trumpet” and the importance of Māori values such as hūmarie (humility). These deeply held cultural values are encapsulated in the Māori proverbs that were quoted in both the questionnaire and interview findings “Kaore te kumara e korero mo tona ake reka. [the sweet potato does not speak of its own sweetness]” as well as “Waihotia mā tētehiatu e kōrero māu [Leave it for others to speak of your feats]”. Hūmarie is explored further in Section 7.6.1 in relation to the importance of appropriate recruitment processes for teacher-leader roles in the Aotearoa | New Zealand context.

Even with applying a cultural competency understanding and being compassionate to the participants’ reluctance to be considered, and vocalise, their expertise unfortunately this resistance creates a paradox. Mangin and Stoelinga (2008) noted that “ironically, the teacher-leader’s reluctance to cast [themselves] as an expert can undermine others’ perceptions of [their] ability to serve as a resource. If teachers view a teacher-leader as lacking expert knowledge, there is little incentive to seek the teacher-leader’s advice or guidance” (p. 470). Furthermore, Hattie (2003) stated in his synthesis of over 500,000 studies that expert teachers do differ from experienced teachers and that they can be distinguished by five dimensions including the ability to; identify essential representations of their subject, guide learning through classroom interactions, monitor learning and provide feedback, attend to affective attributes, and lastly can influence student outcomes.

There were some participants in this study who did clearly articulate their belief that teachers appointed to AST roles with a specialism such as special education or ESOL (English for speakers of other languages) required proven expertise and experience in that area to be able to support others to improve their specialist knowledge and skills. There was a noticeable difference in these specialist AST's experiences. Firstly, their main motivation to apply for the role was due to wanting to utilise their specialism that they were passionate about, skilled at and they stated they were able to enhance their previous specialist role with a wider audience. They were already acclimatised to an expert identity. Whether they were fulfilling the AST role as was designed by policy is debatable, however, they did have less role ambiguity and were more positive about their AST experience. There were also a high number of participants' comments regarding the importance of teacher credibility as a necessary teacher-leader attribute which is grounded in the notion of expertise. Additionally, Raduan and Na (2020) also reminds us that:

Too often viewed in isolation, it is important to consider developing expertise or skill levels in parallel to the progression of career; to consider the multiple pathways that a teacher can progress through; elements of non-linear development such as understanding of practice, integration, and interaction of components of expertise and the dynamic nature of teacher development. (p. 443)

The findings from this study, the research literature, and the prerequisites for eligibility to be an AST suggest that an individual appointed to a teacher-leader role needs to understand the need of being an expert and they must be comfortable that the term is socialised in a culturally appropriate manner within the wider ecological professional landscape.

7.2.3 Intrapersonal Summary Recommendations

This study reveals that to be successful in a teacher-leader position such as the AST role an individual needs to have the appropriate leadership capabilities and attributes, be career ready and embrace the hybrid nature of the position including being prepared to step away from the

classroom and give up other leadership responsibilities. Furthermore, when introducing new teacher-leader government initiatives, such as Kāhui Ako, it is imperative that the policy writers and teacher unions understand the significance of contextual variation and even though the teacher-leaders may have the same title the role itself can play out differently in different contexts and the policy and collective agreements need to be agile to do so. Additionally, a teacher-leader needs to develop the agency of an adult learner whilst understanding and embracing the importance of being viewed as an expert to gain the credibility required for others to be motivated to engage with them in their role. Lastly it is important for those wanting to become an AST to fully embrace and be supported. through the identity transition process. The alternative otherwise is they will be as Turner (1987) states as “betwixt and between” and therefore in:

A state of ‘outsiderhood’, referring to the condition of either permanently and by ascription set outside the structural arrangements of a given social system, or being situational or temporarily set apart, or voluntarily setting oneself apart for the behaviour of the status-occupying, role-play members of that system” (Turner, 1987, p. 233).

7.3 Interpersonal

This part of the SEM relates to the teacher-leaders’ interactions with others in the ecosystem including their own place of work and within the Kāhui Ako schools, kura and early learning centres. This could include interactions with ākonga, teacher colleagues, middle-leaders, senior-leaders, principals, and boards of trustees. The lived experience of the interpersonal interactions of the participants in this study were described as both rewarding yet also challenging and consequently made the biggest impact on their professional identity development. The next section discusses the interpersonal concepts of *shared experience*, *tall poppy syndrome*, and *crabs in a bucket mentality* in relation to the findings of this study.

7.3.1 Shared Experience of a New Teacher Leader Initiative

The introduction of a new group of colleagues due to a government initiative, such as the participant ASTs, into educational ecosystems provided both new, positive, and negative shared experiences for all of those within the ecosystem.

7.3.1.1 Rewarding and Positive Shared Experience. Most of the rewarding positive shared experiences from the perspective of the participants were mainly limited to the interactions with those in Kāhui Ako roles – other ASTs, lead principal and WSTs.

Overwhelmingly most of the participants expressed the importance of the collegial support of other ASTs and were grateful for the benefit of the common shared experience. Very few participants shared any negative experiences with other ASTs and those experiences mainly related to lack of role clarity between them and who was responsible for what in their Kāhui Ako. Even those who were in sole AST roles had consciously sort out and made connections with other ASTs through various online platforms and in-person hui. This shared learning experience created a support network that helped them understand and grasp new concepts. As the ASTs encountered challenges and obstacles while adapting to their roles the shared struggle fostered a sense of camaraderie. As ASTs adjusted to their new roles and the new work environment, having access to others who had previously or were currently experiencing the same transition provided a network of mutual support, encouragement, and reassurance. Conversely, these AST interactions also provided a point of reference or “yard stick” for comparison to themselves which either positively reaffirmed or negatively impacted their professional identity development.

Opportunities for collaborative planning and executing occasions such as Kāhui Ako teacher only days, collective PLD hui, cultural and musical events were described as positive shared experiences and were emphasised as an opportunity for the ASTs to be visible and validated in their roles by others especially principals, senior-leaders, and their colleagues.

The majority of the participants expressed they were grateful for the positive shared experience with their lead principal(s) of the Kahui Ako. However, there was variation in the levels of interaction they had, for example the solo ASTs ($n = 22$) expressed a more personal and close working relationship and shared experience with their lead principal compared to those that were in larger Kāhui Ako which is to be expected and it would be important for deliberate rhythms to be in place for intentional interactions when more people are involved.

7.3.1.2 Challenging and Negative Shared Experience. The challenging and negative shared experiences from the perspective of the participants mostly related to perceived power dynamics, lack of commitment and collaboration by principals and senior-leaders, colleague's resistance, and a lack of communication protocols:

Power, conflict, coalitions, and policy are alive and well in schools and make up the fabric of educational politics. Much of the time, education is not about what is best for children; it is about the adult issues of power and control. (Owen, 2006, p.103)

The findings of this study showed overwhelming evidence of a lack of clear communication channels with all members of the Kāhui Ako especially those who had the everyday responsibilities for areas of focus e.g. DPs, APs and HODs. These findings were also present in Dibben's (2019) study which stated that the exclusion and / or lack of communication with the tier of school leadership that included DPs and APs in Kāhui Ako planning, decision making, and implementation caused tensions with feelings of dissatisfaction, disengagement and in some cases hostility to those in Kāhui Ako roles making it problematic to create a culture of collective responsibility. These findings reinforce research that educators behave differently when presented with a new policy focus or requirement by complying, pretending to comply, ignoring, or possibly even contradicting the policy (Hinnant Crawford, 2016).

There was a significant level of discomfort and disappointment expressed by AST participants who had experienced unsupportive behaviour, including resentment, from their colleagues in the Kāhui Ako. This lack of collegial support was a similar finding in the NANP

study where “in some cases, the AST could not demonstrate to sceptical colleagues the virtue or value of the role and the worth of the release and salary the AST received” (NANP, p. 25). In conjunction with managing the behaviour of sceptical colleagues many AST participants experienced deliberate negative behaviours that theoretically could be explained due to *tall poppy syndrome* and / or *crabs in a bucket phenomenon*.

7.3.2 Tall Poppy Syndrome

The New Zealand Oxford Dictionary defines a *tall poppy* as “a person who is conspicuously successful and whose distinctions frequently attract envious notice or hostility” (Deverson, 1998, p. 833). Consequently, *tall poppy syndrome* “is a New Zealand habit of denigrating or “cutting down” those who are successful or who are high achievers” (Deverson, 1998, p. 833). Individuals high in social dominance orientation, low self-esteem and are aligned to deservingness theory are more likely to want to cut down others (Marques et al., 2022). Despite its “deep roots in culture and ideology” and a terminology familiar and used by some participants of this study the empirical research on tall poppy attitudes in New Zealand remain surprisingly scarce and are mainly focused on barriers in the sporting and business worlds (Marques et al., 2022, p. 641). A similar international concept that does have more teacher-leader empirical evidence is referred to in the literature as the *crabs in a bucket phenomenon*.

7.3.3 “Crabs in a Bucket” Phenomenon

The relevance of this psychological phenomenon for this study is that a “*crab*” mentality is often evident in situations where there is limited opportunity or resources, and / or individuals perceive that their success is threatened by the success of others (Duke, 2014). The “*crab*” mentality is a metaphor used to describe a negative social phenomenon where people in a group or community are unsupportive and actively try to prevent others from achieving success. The name of this phenomenon comes from a story about crabs in a bucket, who fail to escape because they keep pulling back any crab who manages to get to the top in their own efforts to get to the top of the bucket (Abrugar, 2014). In people, “*crab*” behaviour is shown by those who

react negatively, in terms of their thoughts, statements, or actions, to those who get ahead of them, even when they don't expect there to be direct benefits to doing so for themselves (Abrugar, 2014; Bell, 2017; Duke, 2014; Sahin, 2018; Vibes, 2015). People with a “crab” mentality aim to reduce the success of those who are trying to be successful. Even in times of joy and success, they can find points to criticize, but they also do not want to hear any criticism or negativity about themselves (Sahin, 2018). Uncertainty due to change, colleague competition and job anxiety can also be influential factors that cause “crab” behaviours in schools (Cavus & Sarpkaya). This behaviour can be more prevalent in “unhealthy” organisations that have competitive peer culture in which no one admits to making mistakes and “everyone is trying to outdo everyone else to appear aligned with the school’s philosophy of teaching and learning” (Olsen and Anderson, 2007, p.24). Those with a “crab” mentality exhibit such behaviours as: jealousy, criticising, discouraging, and undermining others and exhibiting an impolite and excessively competitive attitude (Abrugar, 2014). The more excessive impolite behaviours can include using harsh words, gossiping, making up conspiracy theories, and refusing to cooperate (Miller, 2019).

When considering organisational behaviour, the phenomenon refers to the collective impact of the individuals within the organization “who do not want others to rise, succeed, and realize their dreams and to instead bring them down” (Cavus & Sarpkaya, 2022, p. 2) leading to a lack of collaboration, communication, and trust among group members, making it difficult to achieve collective goals. It can also create a toxic and hostile environment where individuals feel unsupported, demotivated, and isolated (Duke, 2014). Furthermore, “in schools, when teachers try to make a difference to increase student success and struggle for their career steps, they may face various individual, organisational and administrative problems” (Cavus & Sarpkaya, 2022, p. 3). Real or perceived rewards or recognition perceived by teacher innovators can disrupt the teacher culture and cause aggravation in other teachers (Fullan, 2010). Table

7.14 has been adapted from Cavus and Sarpkaya's (2022) study that examined the crabs in a bucket phenomenon in Turkish public and private high schools.

Table 7.14

'Cavus and Sarpkaya (2022) crab behaviour findings compared to this study'

Categories	Sub-Categories	Evident in this study related to AST role
Crab behaviours exhibited by others in the Kāhui Ako	Making destructive criticism	Yes
	Belittling the work done	Yes
	Gossiping	Yes
	Making the job harder	Yes
AST's reaction when experienced crab behaviours from others	Retreating	Yes
	Resisting	Some
	Cutting off communication	No evidence
The attitudes of other teachers that were not ASTs	Supporting the teacher deterred	No evidence
	Staying silent	Yes
	Acting according to group membership	Yes
	Standing against the teacher deterred	No evidence
	Double-crossing	No evidence
The attitudes of school leaders in the Kāhui Ako	Staying silent	Some
	Double-crossing	No evidence
	Standing against the teacher deterred	Some
	Supporting the teacher deterred	Some
The reasons for crab behaviours	Competition	Yes
	Job anxiety	Yes
	Trying to avoid work	Some
	Being a member of different unions	Some
	Academic incompetence	No evidence

Comparable findings in Cavus and Sarpkaya's (2022) study and this study included educators in the professional ecosystem being jealous, closed off to change, prone to gossip and avoided the collective responsibility of innovation. Furthermore, another similarity was that while a few participants did not remain silent and reacted to the behaviours of others they experienced as negative, it was found that most of the teachers who were exposed to "crab" behaviours exhibited retreating and silencing behaviours and preferred to remain passive rather than resist the crab behaviours they were presented (Cavus & Sarpkaya, 2022). The fixed term nature of

the AST participants role and the power dynamics due to requiring the endorsement of others to be re-appointed was an added pressure and a difference between the two studies.

7.3.4 Interpersonal Summary Recommendation

In summary, the shared experience of a new role consisted of a formative phase where individuals come together to support each other navigate the challenges and opportunities that come with initiating a new policy. This shared journey often resulted in strong team dynamics, fostered a sense of belonging, and contributed to individual and collective growth within and across the educational ecological landscape. The fixed term nature of the Kāhui Ako roles compounded the need to build relationships quickly and staff turnover had a profound impact on the consistency of delivery and the sustainability of initiatives. There was an adjustment period for some of the ASTs when there was a change of leadership especially when it was the lead principal(s) and the added requirement to adapt to a different leadership style and approach.

Mitigating the “tall poppy” and “crabs in a bucket” mentalities required the promotion of a positive and supportive culture, celebration of the success of others, and encouraging collaboration and cooperation across the Kāhui Ako. Key to the development of a culture that mitigates “crab” behaviour manifesting is the requirement of school leaders of all seniority levels to have the knowledge and skills in problem solving and conflict management. They also need to proactively regulate recruitment methods, improve teaching conditions in schools and evaluation mechanisms for performance (Cavus & Sarpkaya, 2022; Weiner, 2011). Additionally, those school leaders need to act fairly, impartially, support setting shared goals, promote commitment, be brave, reward success and encourage continuous learning. Furthermore, when teachers themselves have a growth mindset, where they see the success of others as an opportunity for learning and improvement rather than a threat to their own success. cooperate, are principled and love their profession they are less likely to display and tolerate “crab” behaviour from others (Cavus & Sarpkaya, 2022). Moreover, this study has presented findings that indicated when communities of learning such as Kāhui Ako perform deliberate

acts of inclusion, there is more opportunity for positive change and “crab” like behaviour are more likely to be mitigated. This was demonstrated in the Ōtūmoetai Kāhui Ako with the appointment of DPs as learning mentors with a clear mandate to support and build the capacity and capability of ASTs. This action allowed the opportunity to “value the ‘unsung heroes’ who appeared to sometimes be displaced by the Kāhui Ako model” (ERO, 2019, p. 20).

7.4 Organisational

This part of the SEM relates to the AST’s *sense of place* in the organisation and their interaction with the social norm rules, regulations, and expectations within their own place of work and across all the Kāhui Ako schools, kura and early learning centers. The ASTs needed to operate in a network model while simultaneously working in an educational hierarchical model without displacing others.

7.4.1 Sense of Place vs Displacement

Sense of place refers to the subjective and emotional attachment that individuals or communities have with a particular location or environment. It encompasses the feelings of belonging, familiarity, and identity that arise from a deep connection to a place. Sense of place is often associated with positive emotions, such as comfort, security, and rootedness (Cresswell, 2015). A strong sense of place develops through positive personal experiences and the relationships formed within a community (Kibler and Muñoz, 2020).

Participants disclosed that the newness and mixed public opinions of the AST role seemed to heighten their feelings of insecurity. Evidence indicated inadequate job descriptions, and unclear organisational structures meant that ASTs had an unclear understanding of their reporting lines, decision-making authority, and how their specific roles were interconnected with the established school structures. This resulted in many cases of multiple individuals in the Kāhui Ako experiencing overlapping responsibilities leading to confusion, and at times conflict, about who was accountable for specific tasks. These findings were also echoed in Margolis and Huggins’s (2012) hybrid teacher-leader (HTL) study where with no clear,

obtainable job description the HTLs tended to create the job “on the fly” and de-facto definitions of their role emerged between the different people involved. Further comparisons between the two studies are discussed in Section 7.6.3.

Mechanisms that do support a strong sense of place for those in new roles generated by a government initiative include a collective commitment and agreement on the purpose of the role, clear job descriptions, robust induction, ongoing professional development, and mentoring. Most importantly so there cannot be any ambiguity, misunderstanding or displacement of others it is paramount the purpose of the new role and how the addition will complement other roles must be socialised with everyone.

7.4.2 Collective Commitment and Agreement within the Kāhui Ako

The overwhelming sentiment from the AST participants in this study was that collective commitment and agreement of the kaupapa (principles) and mahi (work) to be prioritised coupled with the willingness and ability to collaborate were critical in their success.

The most significant barrier that ASTs came up against was the denial of access to teacher colleagues in their own place of work as well other Kāhui Ako members' places of work by principals and senior-leaders. Subsequently, this behaviour significantly impacted their ability to perform their role. This was a similar finding in the NANP (2022) evaluation:

Some ASTs commented that they had been ‘caught in the crossfire’ of principals who did not always see the value of being invested in the Kāhui Ako and were more focused on ‘what is in it for our school individually’. Some [ASTs] also observed that the collaboration within Kāhui Ako is about seeking knowledge and skills from wherever it exists, including the wider community and that allowing ‘more lights to shine’ was a struggle for some principals. (NANP,2022, p.24)

One explanation of the perceived resistance experienced by the participants could be due to a difference in policy interpretation. Ball et al (2012) state that policies rarely tell you exactly what to do and educators must be able to exercise professional autonomy when

interpreting policy to meet educational needs (Bocking, 2020). However, even with the broad Kāhui Ako policy interpretation this was further complicated with the critical factor of workplace power relations determining the professional autonomy of ASTs resulting in participants feeling shackled at times and unable to perform their role (Bocking, 2020). Moreover, no matter the origins of the resistance all the participants interpreted leaders' resistance to collaboration as a personal affront and this led to the feeling of alienation which in turn negatively impacted their professional identity development. Alienation was also noted as an unintended consequence in Pugh and Zhao (2003) study of a bottom-up grant reform model intended to foster technology innovation in education in the United States. The grant program was designed to empower teacher-leaders to integrate technology innovations in their classrooms. Overall, the findings indicated that grant recipient teachers experienced alienation when their initial subjective sense of empowerment was undermined by the school culture and by school leadership decisions (Pugh & Zhao, 2003). Two possible reasons for the alienation were identified. Firstly, resources obtained through grant acquisition were seen to disrupt the egalitarian teacher culture, and secondarily increased subjective empowerment and pressure afforded by the grants lead to an escalation of existing conflicts (Pugh and Zhao, 2003). As previously discussed in relation to creating successful interpersonal relationships involving others early in the generation of ideas and planning stages of an innovation can reduce alienation and increase support due to a combined feeling of ownership (Pugh and Zhao, 2003).

7.4.3 Supportive Mechanisms of new Teacher Leader Roles

The participants in this study experienced mixed levels of support as they transitioned to an AST. These experiences ranged from those who expressed they had been fully supported and consequently they developed a strong sense of place to those that described feelings of disorientation, isolation and even at times feeling professionally unsafe.

The quality of teacher-leadership depends on the culture of the school largely determined by the principal and their leadership (Katzenmeyer & Moller, 2009) and

organizations will struggle with change when they fail to recognize and support individuals through transition phases (Bridges & Bridges, 2019; Manderscheid & Davidson, 2016; Ritchie, 2023). It was therefore concerning that even though participants mainly felt supported by their employing principal, there was a mixed level of support from the other senior-leaders in their school. This lack of support included some “crab” mentality behaviour mainly related to territorial concerns that either went unseen or were tolerated by the principals. There was also a variation of support related to access to mentoring, professional development, entitled release time and the ability to relinquish other responsibilities.

One issue that seemed to compound the lack of support was due to lack of process and communication with the different parties in the Kāhui Ako with leaders assuming someone else held the responsibility. For example, participants explained that their own school leaders had assumed that they would be directed, mentored, and appraised by the Kāhui Ako lead principal(s) and therefore this was not their responsibility. This belief and lack of direct communication compounded the lack of visibility and understanding of the AST role with senior leaders. As much as participants were grateful for the collegial support from their lead principal(s) there was no evidence in this study of lead principals’ taking responsibility for a more formalised mentoring role. A significant proportion of the participants commented about the lack of formalised systematic mechanisms to give and receive feedback and therefore gain validation in their AST roles was lacking and compounded any feelings of insecurity. This experience was exacerbated even further in Kāhui Ako that experienced a high turnover of personnel especially when the principal or the lead principal changed. This situation reinforced the research findings described in the literature that if a key individual leaves a role, or a role ends, before the culture is sufficiently developed and internalized, the change may not survive their departure (Fullan, 2000). It also reminds us that there must be norms of collaboration and practice and programmes in place for teacher-leaders to emerge and continue to grow and be nourished (Gilles et al., 2018). Additionally, “principal-teacher agreement on guidelines for

teacher-leadership will go a long way toward eliminating the role ambiguity, conflict and misunderstandings” (Jacobs et al., 2016, p. 402).

It would be accurate to say on the most part that support and formalised specific teacher-leader professional development for the participants of this study was left to chance many were left to “sink or swim” in their AST role. In contrast lessons could be learned from the Teacher Learning and Leadership Program (TLLP) which was a collaboration between the Ontario MOE and the Ontario Teachers Federation (OTF) comprising several teacher unions (Lieberman, 2015). Launched in 2007 and funded for 12 years teacher-leaders were awarded a grant on an approved collaboration proposal to improve teaching and learning with their colleagues. TLLP supported experienced teachers to undertake self-directed professional development; develop leadership skills in sharing their learning and spreading exemplary practices and facilitate knowledge exchange by working and collaborating with others (Lieberman, 2014). The programme was well received by teachers and most significantly could be viewed as an example of a successful collaboration between policy makers (MOE) and those representing practicing teachers (OTF). The MOE and OTF took mutual responsibility for facilitating training, troubleshooting and being accessible to teachers. Participants commented on how they were able to develop as teacher-leaders by, “building leadership skills for leading a project, developing, and sharing their expertise, presenting within their school and a wider community, and dealing with change processes and interpersonal dynamics” (Campbell et al., 2013, p 3).

7.4.5 Organisational Summary and Recommendations

The findings of this study reveal that for teacher-leaders to undertake a new government-initiated role and develop a strong sense of place it is imperative that there is a collective commitment and agreement to the key objectives and deliverables of the initiative, robust induction and socialisation of new roles that includes ongoing professional development and mentoring. To gain collective agreement and commitment it is crucial to have clear and comprehensive job descriptions that are co-constructed especially with others with overlapping

responsibilities, establish a clear organizational structure with well-defined reporting lines, and develop strong communication channels to keep all informed. One study by researchers at Brown University found that teachers working in schools with more supportive professional environments that included peer collaboration, teacher evaluation, tailored on-the-job training, and organizational supports improved their instructional effectiveness by 39 percent more than teachers in less supportive environments over a ten-year period (Papay and Kraft, 2016). Working conditions in schools that are social in nature including school leadership, collegial relationships and school culture are an important reason for teacher attrition above even the strains of working in high - poverty schools (Simon & Johnson 2015). In summary those who are given new teacher-leader roles due to government initiatives need working environments where they can be successful due to: robust induction, opportunities to work with other educators in professional learning communities rather than in isolation, receive mentoring with meaningful feedback, are provided with professional development opportunities and advancement prospects that are well remunerated with competitive salaries (Cochran-Smith, 2004; Cordingley et al., 2019; Gurr & Drysdale, 2013; Sims, 2017).

7.5 Community

This part of the SEM relates to the teacher-leader's relationship with the wider community including whānau (family), hapū (sub-tribe) and iwi (tribe), professional development advisors, unions, and government officials.

Participants expressed enormous appreciation for their involvement in the Kāhui Ako wide PLD and attributed these opportunities to being in their AST role. The government's significant investment into the contracting of expert partners⁷ was mostly well received by the

⁷ From 2017- 2019, the MOE offered Kāhui Ako expert partner support who were “academics and expert practitioners contracted to work alongside the communities to strengthen their data analysis and identify the professional learning and development opportunities that will most help their teachers to accelerate student achievement” (Hon Minister Parata, 2016).

participants of this study and they were grateful for the opportunity to be associated with experienced and knowledgeable individuals. There were a few participants who commented they believed the expert partner in their opinion had perhaps too much influence over the direction of their Kāhui Ako. However, there was a more widely expressed belief that the expert partnership was at a systemic level and often the most beneficial to the Kāhui Ako lead principal(s) rather than individuals in the AST role therefore expressing a view that an officially appointed mentor of the ASTs would have also been useful. Jacobs, Gordon, and Solis (2016) support this finding and recommend that it is beneficial to have experienced and successful teacher-leaders mentor new teacher-leaders. Furthermore, suggesting the need for a “critical friend” from outside the school with the expertise in teacher-leadership to provide critical feedback and suggestions for solving problems experienced by new teacher-leaders (Jacobs et al., 2016).

There were limited specific questions in the study related to engagement with the wider community in particular whānau, hapū and iwi and there were comments that the Kāhui Ako was either in early implementation or that participants had not been in the role long enough. Hence, there was limited evidence in this study about how ASTs were involved in strategies, to increase engagement with the wider community except to those who were assigned to a cultural competency specialism portfolio. Nonetheless, there was a lot of evidence in this study of the acknowledgement and importance of identity, language, culture and honouring Aotearoa | New Zealand’s founding document Te Tiriti o Waitangi (Treaty of Waitangi) from all participants. Similar findings were also found in the NANP (2022) study which stated that many Kāhui Ako had focused on strengthening connections with mana whenua (indigenous people). AST participants in the study gave examples of where their Kāhui Ako were collecting mana whenua voice by ensuring local histories and stories of the place and people were valued and made visible in the localised curriculum, offering te reo Māori and tikanga (cultural protocol) classes, involving iwi as part of their stewardship or governance groups and reflecting iwi voice in

student profiles. Responses also indicated that relationships with local marae were highly valued. Some ASTs had carried out a “cultural audit” and some Kāhui Ako had been “given special local gifts, including whakatauki [proverb], karakia [pray], waiata [song], haka [dance] and received input into the Kāhui Ako logo. Some iwi [tribe] were also involved in the development of graduate profiles and environmental projects” (NANP, 2022 p.21).

7.5.1 Community Summary and Recommendations

Evidence from this study supports the need for the whole educational ecology, including community, to be considered by any policy that is aimed at providing career opportunities for teacher-leaders and increasing student achievement such as Kāhui Ako. The policy needs to allow for resourcing appropriately so that purposeful, meaningful, and authentic interactions can happen.

7.6 Policy

This part of the SEM relates to the socio-cultural aspects within which the teacher-leader functions including the creation and implementation of government policies and regulations. This section discusses: the importance of genuine consultation and co-construction required when designing policy that impact educators, the importance of teacher collective agreement alignment and the necessity of appropriateness of teacher-leader recruitment.

7.6.1 Appropriate Recruitment Processes of new Teacher-Leader Roles

As presented in Sections 4.3, 4.4, 5.2.3 overwhelming participants experience of the NANP process was more negative than positive and arguably could be viewed as a barrier to potential teacher-leaders applying for the AST role. For this study recruitment process appropriateness relates to being culturally inclusive as should be expected in New Zealand and often referred to as a “mana-enhancing” (respectful) experience with the added expectation of being equitable in effort required to other leadership positions. The bureaucratic, arduous, and taxing aspect of the AST application and re-application process can be redeemed by an independent review of the NANP process and re-consider what is expected of the potential applicants. The perceived

lack of cultural appropriateness voiced by the participants of this study is a lot more complex and will be briefly addressed below but requires due consultation with the appropriate key stakeholder groups to assess and provide guidance.

7.6.1.1 Cultural Appropriateness of Teacher-Leader Recruitment in Aotearoa. In this study twenty-four participants identified as Māori, and five identified as Pasifika. All the Māori participants commented on being motivated to apply for the AST role due to the importance of raising the cultural responsiveness of their Kāhui Ako, honouring biculturalism and to support ākonga Māori and their whānau. All the Māori and Pasifika participants referred to challenges due to the Eurocentric of the application process.

Mitchell and Mitchell (1993) state for some Māori teachers, a conflict exists between maintaining their own identity and culture whilst working within a Pākehā (European) system and often requiring them to function in non-Māori manner. “Māori teachers in mainstream settings are often faced with significant challenges. The challenge of working in a Eurocentric environment, intercultural misunderstandings, and the additional cultural expectations and responsibilities all impact on the wellbeing of Māori teachers” (Torepe et al., 2018 p. 48). From a Māori perspective, wellbeing, or hauora, involves spiritual, physical, mental, emotional, and social wellbeing (Durie, 1998). Mana is central to Māori understandings of hauora. Mana translates as “authority, control, influence, prestige, power” (Te Aka Māori Dictionary). Royal (2007) adds “Mana is central, fundamental, and foundational to the traditional Māori worldview. Almost everything in traditional culture was somehow linked to mana and it is upon mana that one might construct a perspective on the nature and purpose of education” (p. 42). Perceptions of mana are therefore critical to understandings of the Māori world, and the Māori person, (Huriwai & Baker, 2016).

The cultural barriers in the NANP application processes are a previously underexplored consideration. In this study, Westernised application processes conflicted with the cultural identities of participants. Certain ethnic customs and ways of doing things acted as a barrier in

a society dominated by Western ways of knowing and doing (Cardno & Auva'a, 2010). Pacific ways like the te ao Māori worldview “do not support ambition and self-promotion; Pacific people value humility and service to others and find it difficult to ‘boast’ about their achievements and successes” (Highley, 2023, p.22). Termed the “silent voice” Pacific peoples can be reluctant to speak out about their concerns and things that are not working well (Cardno & Auva'a, 2010). The Ministry of Education Action Plan for Pacific Education 2020-2030 is a government commitment to transform outcomes for Pacific learners and their families. Key Shift 5 of this Action Plan focuses on valuing, growing, and retaining “teachers, leaders, and educational professionals with diverse Pacific heritages” (MOE, 2020, p. 38). Further stating for Pacific communities, it is important to have “teachers and leaders who can easily relate to and empathise with diverse Pacific learners” (Ministry of Education, 2020, p. 38). Yet Highly (2023) argues “although Pacific peoples are one of the larger ethnic groups in New Zealand, representation is not reflected in the leadership of our schools” (p.20). The confidence of aspiring Pasifika leaders needs to be increased and addressed through leadership development programmes targeted to meet specific ethnic needs related to both personal and systemic barriers (Cardno and Auva'a, 2010). Due to this study's findings, it is suggested that the NANP application process should be considered whether it is one of those systemic barriers.

7.6.2 Teacher-Leader Positioning in Policy Enactment

To address educational concerns new governmental policies are introduced for educational bodies and unions to consider and enact in schools. It has been argued that policy enactment is not a linear hierarchical process wherein governments or authoritative associations make a decision that is then implemented by different groups of individuals, such as teachers and administrators (Ball et al., 2012; Farhadi & Winton, 2021; Ozga, 2000). This study illuminates the dynamic, “creative process of interpretation and recontextualization” (Ball et al, 2012, p.3) of policy enactment as well as demonstrates variations in the dimensions of local context in

combination with the external context and “why people in similar-seeming schools enact the same policy differently” (Farhadi and Winton, 2021, p. 119).

Policy enactment theory recognizes that policies are constantly remade by the people responsible for translating them “from text to action and the abstractions of policy ideas into contextualized practices” (Ball et al., 2012, p. 3). According to this theory when any educational policy is enacted seven types of “policy actors” or “policy positions” evolve including narrators, entrepreneurs, outsiders, transactors, enthusiasts, translators, critics, and receivers. These “actors” are positioned differently and take up different positions in relation to policy, including positions of “indifference or avoidance or irrelevance” (Ball et al., 2011, p. 625). These positions are not necessarily “specific individuals nor fixed, unified, and mutually exclusive ‘types’ of person in every case and people may move between these policy positions” (Ball et al., 2011, p. 626). This study has presented many of the possible “policy positions” related to Kāhui Ako with the ASTs cast as a main “actor”.

It could be argued that those who choose to embark on Kāhui Ako leadership roles, especially ASTs are part of the main cast of “actors”. This study showed evidence that the participants were not only driven by a personal motivation to apply for the AST position but also at times experienced a lot of pressure to spend time as an “entrepreneur actor” and to be the “face” of their Kāhui Ako. *Entrepreneurs* are charismatic people and often have persuasive personalities and are personally invested in a policy idea that they champion. Entrepreneurs also recruit others to their cause to build a critical mass of change to enact policy (Ball et al, 2011). However, the findings of this study also indicate that to be successful in their AST role the participants needed others, especially the principal stewardship groups and other SLT such as DPs, to believe that the role was legitimate and that there must be a measure of agreement about common goals (Croll et al, 1994).

7.6.3 Hybridisation of Teacher-Leader Roles

Findings from this study over-whelming showed that the policy intention of the hybridisation of the AST role was equally both beneficial and problematic.

Hybrid-teacher-leader positions such as the AST role allow for career exploration and are a valuable opportunity for the participants of this study to “dip their professional toes outside of the classroom...to see if non-teaching work suits their temperament and goals before diving in” (Bagley & Margolis, 2018, p. 39). Other positive factors that were evident in this study include the ability for ASTs to take on meaningful and necessary leadership work while still contributing directly to a learner’s education as a teacher. The hybrid-teacher-leader role also creates the opportunity to use classrooms as a “laboratory” for colleagues to observe teaching practice in action as well as keeping the hybrid teacher relevant and credible (Bagley & Margolis, 2018).

Conversely, hybridisation of roles carries the potential risk of “ecological chaos rather than environmental stability, growth and knowledge resource distribution” (Margolis & Huggins, 2012, p. 310) and requires more intentional culture building within the professional landscape to encourage non-teacher-leaders to step “out of the trenches” into a new hybrid role (Bagley & Margolis, 2018, p. 39). This ecological chaos can also be due to hybrid-teacher-leaders struggling to switch roles between teacher and leader and therefore “stress can result from the juggling that occurs when these individuals are simultaneously teaching and leading... [compounded by] the varied, ambiguous, and sometimes all-encompassing nature of their leadership work” (York-Barr and Duke, 2004, p. 283). This chaos was confirmed in the findings of this study especially where the parameters and role descriptions were unclear; complications arose due logistics of timetable management and job sharing (Bagley & Margolis, 2018). Researchers also stated hybrid-teacher-leaders need to move past the bias of practitioner colleagues believing that hybridity is “less than” (Bagley & Margolis, 2018). Were in actuality, as shown in this study, participants found that juggling between different spheres ultimately

created a more than full-time position rather than the straightforward balance of different responsibilities leading to personal stress and potential burnout. Further findings were comparable between Bagley and Margolis (2018) study and this study including evidence of:

- No clear, obtainable job description; the participants tended to create the job “on the fly” and “de-facto” definitions of their role emerged between the different people involved.
- Participants struggled to balance their role of classroom teacher and leadership responsibilities in the time allocation given.
- Participants tended to work with the coalition of the willing and avoided the more resistant teachers, especially when the hybrid-teacher-leaders were under pressure and instead retreated to their own classrooms and offices.

One major difference between the two studies related to the expectation in Bagley and Margolis (2018) study that the hybrid-teacher-leaders were expected to model lessons for their colleagues. This was not an explicit expectation of the ASTs. If this did become more of a formalised expectation of ASTs or other teacher-leader initiatives in New Zealand it would be important to note that this was something that rarely happened in reality due to a myriad reasons including the complications of scheduling and logistical conflicts as well as. The hybrid-teacher-leader’s perceived risk of teacher colleagues becoming dependent on having them to take their class for them. Furthermore, evidence showed that hybrid-teacher-leader’s expressed insecurity about losing their credibility from a “failed” observation, and their colleagues would judge their appropriateness for the role (Margolis & Huggins, 2012).

7.6.4 Kahui Ako AST Role as an Alternative Career Pathway

On a positive note, there were participants in this study that stated that their experience as an AST had provided them with tremendous professional and personal growth and it has been argued that one of the most positive results of teacher-leadership opportunities is the effect on teacher-leaders themselves (Jacobs et al., 2016). Teacher-leaders are able “to simultaneously

pursue personal goals, professional aspirations and moral imperatives” (Margolis & Deuel, 2009, p .283). The creation of positions like the Kāhui Ako AST role provides teacher-leaders with a wide variety of work at multiple levels in the educational system including working with students, colleagues, leaders, on work that is focused on instructional, professional, and organisational development (York-Barr & Duke, 2004). This in turn allows for the opportunity to “change pedagogy, curriculum and long-held beliefs about teaching and learning” by utilizing “their own teaching to support other teachers learning, enhancing their ability to obtain knowledge in practice and knowledge of practice” (Margolis & Huggins, 2012, p. 955). As a result of new leadership roles, teacher-leaders grow in organisational knowledge, improved instructional practices, have increased motivation, develop reflective thinking and leadership skills (York-Barr & Duke, 2004). Finally, those that have taken on new teacher-leadership roles are more likely to remain in the profession (Berry et al., 2010; Jacobs et al., 2016). However, as discussed, retention can be temporary depending on the terms of employment and the impact of their experiences on their professional identity development.

As explained in Chapter 1, one of the intentions of the IES policy was to retain teachers in the profession and to provide alternative career pathways. Work conditions, intrinsic and extrinsic rewards, and opportunities for professional growth are factors that influence teacher retention (Jacobs et al., 2016; Moller, 2001) conversely both retention and career pathway viability will only be temporary for fixed term roles like the AST role and was a concern for all the participants of this study. Additionally, there were a few participants who expressed that taking on the AST role had been a hindrance to their career pathway aspirations as the role was mainly misunderstood and not highly regarded by some school-leaders compared to other leadership roles. This study also provides evidence that the AST role is an opportunity potentially only accessed by those who are prepared to complete the time intensive and daunting Eurocentric recruitment process and brings potential inequity conflict. The main criticism of the remuneration and release time of the Kāhui Ako positions related to the lack of equity with

existing leadership positions causing professional jealousy which has been well covered. However, there was also a lack of insight from the government in relation to the practicalities and reality of the roll out of resourcing Kāhui Ako positions creating an enactment gap. There were obvious inequities when considering role size and remuneration. For example, a Kāhui Ako lead principal was provided the same release time and remuneration leading a Kāhui Ako of three member organisations as a lead principal with over 20 member organisations. An AST as a sole charge was given the same release time and remuneration as an AST who worked with a team of 5-6 colleagues. Similar, and further, empirical findings of another teacher-leader alternative opportunity initiative set up by the Department for Education and Skills (DfES) in the United Kingdom in 2002 was called the Transforming School Workforce Pathfinder Project. The project included 32 schools piloting “efficient and effective ways in which teachers could be freed up from bureaucracy to focus on teaching” (Gunter et al., 2007, p. 27). Research evaluating the pilot found that the short-term nature of posts made it difficult to recruit the right calibre of staff, highlighted the difficulty to establish a continuity of relationships and a lack of ability to make sustainable changes (Gunter et al., 2007).

7.6.5 Where to Next and What Does That Mean for the AST Participants?

Many participants expressed their anxiety of what next for them when their fixed term contract finished, especially since what had attracted many of them to the role was due to it being different and more suited to them from other leadership roles. Unless another leadership role could be secured it would mean a return to the classroom fulltime and except for a few participants who had struggled with the hybrid nature of the AST role that was not what most of the participants were wanting to do.

Munroe (2014) conducted a study about teacher-leaders who held dual leadership and classroom teaching roles at the school, district, or provincial level that contributed to student and school success then they returned to full time classroom teaching. In her research she

describes the notion that teachers' professional careers are like the game of Snakes and Ladders and that climbing the ladder is similarly widely accepted as positive due to:

Most steps up the career ladder bring increased salary, responsibility, respect, and self-affirmation. Educators converse about such career moves using phrases such as “accepting the challenge to . . .,” or “moving on to . . .,” and most see the steps up the ladder in a positive light. (Munroe, 2014, p. 2)

Munroe further emphasises even when there is criticism how certain positions are taking the best teachers out of the classroom, the move is still seen as a progression up the ladder. Yet when teacher-leaders return or “go back” to the classroom full-time whether voluntary, due to frustration of a hybrid dual role, missing full time teaching or non-voluntary due to the end of a fixed term contract it is often viewed as a slide down the “snake”. She recommends that “various stakeholders might think about how to increase mutual awareness of the teacher-leader’s former professional work and how the return to a school-based position might be more intentional while still respecting the individual’s potential need for acculturation” (Munroe, 2014, p. 22). These findings were also present in this study as participants reflected on the end of their tenure. Their main concern was that upon returning to their former role full time they would have evolved and be changed due to the learning and opportunities they experienced and perhaps will have outgrown the role. They also elaborated further to say that due to the limited leadership opportunities they may not be able to pivot into another opportunity.

Burns and Badiali (2020) also stated that when assuming a new role individuals experience critical incidents that transform them over time. However, the incremental transformation can be hidden and is most often not revealed until the transformed individual is returned to their former role with a new perspective. When the transformed individual returns to the original context they may experience even more “disorienting dilemmas that create cognitive dissonance and in critically reflecting on disorienting dilemmas, tacit transformations become more concisely evident” (p.189). This is where the Kāhui Ako policy is at odds,

generated due to wanting to retain effective educators by providing alternative career pathway opportunities, however, the fixed term nature means the pathway is not sustainable and can even result in disillusioned teacher-leaders who leave education anyway. Further study and research would be useful to examine the experiences of teacher-leaders who complete their fixed-term role and find themselves as full time classroom teachers again.

7.6.6 Policy Summary and Recommendations

This section discussed the importance of appropriate teacher-leader recruitment, policy enactment gap, the consequences of hybridised and fixed term teacher-leader roles on teacher-leader job satisfaction and retention.

One of the most significant consequences when expensive policy reforms like Kāhui Ako are deemed to not be successful or sustainable is its contribution to reform fatigue. Reform fatigue, or the cumulative effect of a series of failed reforms, are cited in the literature as negatively impacting on teachers' engagement with new reforms when they are introduced resulting in teachers learning to "retreat to the safety of their own classrooms...[looking] for ways to incorporate [the reforms] as superficially as possible" (Datnow & Springfield (2000, p. 198). The extent to which a reform is actively engaged with and pursued, is also a significant predictor of student achievement gain (Datnow, 2005, p. 193). Therefore, a recommendation of this study is that for policy reform to be successful policy writers must consult with those individuals closely associated with the area the policy is directed, especially those who are key agents in determining the success of the reform (Caldwell, 2003; Derrington & Anderson, 2020; Datnow, 2000; Desimone, 2002; Fullan, 2000; Hertling, 1999; Hopkins & Levin, 2000). This consultative approach requires a two-way relationship with both bottom-up (teachers tasked with initiating the initiative) and top-down (the individuals leading the initiative) to foster and sustain change (Fullan, 1993). One example of this approach is the Leading from the Middle (LfM) strategy from Ontario, Canada. LfM has been described as "enabling and empowering districts to drive change based on their own needs and expertise rather than simply

implementing changes imposed from the top” (Hargreaves & Shirley, 2020, p.106). Furthermore, LfM offered an option “to achieve greater quality and equity by having leaders collaborate closely with each other to improve teaching, learning and well-being and provides evidence of an integrated philosophy, structure, and culture of change that has advanced aspects of shared, democratic, or distributed leadership that have been advocated for many years but that have been difficult to bring about in practice on a systemic scale” (Hargreaves & Shirley, 2020, p.110). Lastly when involving teacher-leaders it is a recommendation of this study that those individuals are given professional development opportunities to learn about policy development. The Tennessee Educator Fellowship (TEF) is an example of an initiative implemented to increase educators’ knowledge of the educational policy process. The intention of TEF was to support “teacher policy leadership” defined as “teachers who can both influence and support policy change and development through ongoing advocacy practices with colleagues, policy makers, and other stakeholders while maintaining classroom-based responsibilities” (Derrington & Anderson, 2020, p. 4). A further recommendation is that as part of this consultative co-construction of policy existing and future educational policies must be taken into consideration and need to complement and not compete. The employment conditions of ACET and SCT, before the Kāhui Ako policy, and then the introduction of the LSCs in 2020 after the establishment of Kāhui Ako are such examples provided in this study. Finally, when implementing fixed term positions such as Kāhui Ako roles it is also just as important to provide further developmental and career opportunities after the tenure is finished.

7.7 Limitations

Empirical research, which involves gathering and analysing data to answer research questions or test hypotheses, will have limitations. For this study, they included self-selection bias, limited perspectives, sampling scope, a global pandemic, as well as managing researcher-self.

Even with a robust sampling design and a decent uptake level from participants a limitation of this study related to the relevance of self-selection bias, defined by Stone et al (2024) as “individuals deciding for themselves whether or not to participate in a study, lies in the possibility that the sample will not adequately represent the population from which it was drawn.” (p. 2075). The self-selection bias for this study related to both the Kāhui Ako leaders who were asked to give permission for ASTs to be part of the study and the ASTs.

The limitation of focusing on one group’s perspective means the perspectives of the wider socio ecological professional landscape of a Kāhui Ako including those who interact with ASTs could not be taken into consideration. Nor was I able to therefore verify the claims of the participants by triangulating data drawn from different groups (Flick, 2014).

It was crucial that this study adhered to ethical principles to protect the rights and wellbeing of participants as outlined in Section 3.3. However, some of those ethical constraints also limited the sampling scope of the research due to the removal of the 13 Kāhui Ako with whom I had a professional relationship at the time. This group had a potential sample population of approximately another 80 more current and past ASTs. Another limitation of scope was that participants were recruited just as New Zealand was going into national lockdown due to the COVID-19 pandemic. Consequently, Kāhui Ako leaders, who were also leaders in their schools, were preoccupied with preparing for digital distance learning for their staff and students. However, a positive of the lockdown was the interview participants were at home and more readily available for an online interview rather than on site, at their school, and a time for the interview could therefore be more flexible and accommodate home caring responsibilities.

Empirical research involves researchers making decisions and interpretations at various stages of the research process, including study design, data collection, and data analysis. Subjectivity in decision making and interpretation can introduce biases or alternative interpretations, potentially impacting the validity of the findings. Hoffmann (2007) also underlined the challenges of “emotional labor” (p. 323) when focusing on the multiple, often conflicting roles that a researcher must assume within a study. As previously outlined, the use of memoing, epoché and supervision were important support measures to mitigate subjectivity and interpretation.

7.8 Future Research Directions

Future research directions could include gaining the perspectives of other key individuals that impact and influence the AST experience and are integral to their professional identity development. Due to this study’s findings suggesting that the Kāhui Ako recruitment application process is a potential systemic barrier more empirical evidence would be beneficial on successful recruitment strategies for teacher-leader government initiatives. Additionally, Constantinides and Eleftheriadou (2023) conducted a systematic review of literature related to Kāhui Ako written since the policy announcement in 2014. A total of 16 publications were analysed. A notable finding was that almost a third of the reviewed documents were written by NZCER chief researcher Cathy Wylie or Wylie and colleagues. In their opinion, despite the IES policy being initiated in 2014, most of the empirical studies “appear to merge into a cohesive yet sparse literature base that shares relatively similar notions of the ways in which these networks operate and how formal leadership roles are enacted” (Constantinides & Eleftheriadou, 2023, p. 13).

7.9 Conclusion

The introduction of the Kāhui Ako initiative in 2014 was debatably a response to a number of pressures that the government at the time were facing including the pressure to raise learner achievement, especially for those who were most underserved, and to retain the services of the most effective teachers in the education system (Wylie, 2013, 2016, PPTA, 2017a). Formalised Kāhui Ako collaboration was expected to result in significant and sustained improvement in students' educational outcomes and address the needs of those at most risk to close the gap between underachievement and achievement (ERO, 2019; MOE, 2016a). However, as demonstrated by this study, the assumption that by providing resourcing alone to increase the connectivity among and between educators did not inevitably result in policy intentions. Intentional, purposeful, and meaningful connections were key. It is both the quantity and quality of interactions that matters. More is not always better. Additionally, commitment and belief in the principles underpinning Kāhui Ako for New Zealand schooling communities was always going to be difficult, some would argue near impossible, considering the significant paradigm shift required from an entrenched culture of competition to one of collaboration. Ultimately the Kāhui Ako policy was counter intuitive to how schools had been operating under the Tomorrow's School's policy (Bendikson et al., 2015; Charteris & Smardon, 2018; ERO, 2019; Highfield & Webber, 2021; Thrupp, 2014, 2017; Wylie, 2013, 2016). Genuine buy-in and sustained commitment from all involved is critical, only educators who actively engage and seek learnings from their colleagues are likely to report higher levels of improved professional practice and reap the rewards of network participation (Sinemma et al, 2021).

Expanding formal teacher-leader roles through government policy can be an effective strategy for addressing teacher retention if those roles are carefully designed, implemented, and supported (National Institute for Excellence in Teaching, 2018; Teach Plus, 2014; Olsen & Anderson, 2007). Additionally, the appetite for such policies that inevitably enable teacher-leader working conditions that support professional growth career opportunities is not refuted

in the research nor in this study (Cochran-Smith, 2004; Cordingley et al., 2019; Jacobs et al., 2016; Moller, 2001; Sims, 2017). Also reinforced in this study schools do benefit from “more fuel in the “instructional leadership” gas tank, and expert teacher-leaders are the obvious energy source” (NIET, 2018, p. 8). The participants of this study willingly embarked on their AST journey due to encouragement from others, the attractiveness of the AST role, as a stepping stone to future promotion, a personal belief in the kaupapa that underpinned the Kāhui Ako initiative and lastly due to the negative perceptions of other leadership roles. However, due to the fixed term employment and resourcing constraints of policies generated by government initiatives, such as Kāhui Ako, the AST role was not a sustainable alternative career pathway for participants and would be better described as a “career opportunity”.

The findings of this study showed that the participants’ overall AST experience varied significantly, impacting both positively and negatively on their effectiveness in their role and shaped their professional identity accordingly. It is important for government officials to grasp, that the road for teacher-leaders to impact educational policy is “chockfull of obstacles” (Hinnant Crawford, 2016, p. 8) that are intensified due to complex contextual ecological professional landscapes. Hence, the overall key findings of this study alongside other empirical evidence form the basis of proposed teacher-leadership and professional identity frameworks. Considerations and recommendations for designing and implementing future teacher-leader government initiatives have also been presented in an effort to support mitigation strategies and minimise the potential gap between the intent and expectations of policy initiatives and the subsequent enactment and experience of implementation in practice.

APPENDICES

Appendix A: Phase 1: Qualtrics Questionnaire Consent Form and Questions



**EDUCATION AND
SOCIAL WORK**

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The University of Auckland
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Auckland 1135
New Zealand

QUALTRICS ELECTRONIC CONSENT: Please select your choice below.

Clicking on the “**Agree**” button indicates that

- a) I have read the Interview Participant Information Sheet (PIS) and understand the intention of the study.
- b) I understand that only the researcher and the University of Auckland supervisors of this study will have access to the data for the purpose of analysis.
- c) I agree that the data gathered will be used for the researcher’s thesis and / or future publications.
- d) I understand that the participants will not be named in the published research findings. However, I understand that while the research findings are confidential and all efforts will be taken for anonymity, identification of groups or individuals may be identified due to the nature of the participants’ responses.
- e) I understand that if I have further questions relating to participation in this research, I may contact the researcher directly.
- f) I voluntarily agree to participate and understand I can exit the questionnaire at any stage before the Submit option.
- g) I am 18 years of age or older.

☐ Yes I Agree

☐ No I do not Agree

INTRO

The Communities of Learning | Kāhui Ako government initiative was designed to improve two aspects of the New Zealand education system. The first was a focus on increasing the academic achievement and engagement of students, and the second was to provide an alternative leadership career pathway. The focus of this research study is on the second aspect of the policy. This study seeks to understand the effectiveness of the Across-schools-teacher role as an alternative career pathway and the reality of your experience in this newly created role.

The following section asks you questions about your motivation and rationale for why you applied for the Kāhui Ako across-schools-teacher role and your experience of the application and re-application process.

Q1 Which description below **BEST** describes your rationale for choosing to apply for the Kāhui Ako across-schools-teacher? **Stepping Stone, Constructive Downsizing, Career choice, Interesting Interlude OR Something Else**

	Describes me extremely well	Describes me very well	Describes me moderately well	Describes me slightly well	Does not describe me
Stepping Stone: One step on my way from the classroom towards other middle and senior-leadership positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Constructive Downsizing: I have held middle and/or senior-leadership roles and have now decided to return to the classroom as an alternative to staying in senior-leadership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Career Choice: This position appealed to me as a different choice to the “traditional” middle-leadership roles and provides an opportunity to utilise my expertise and knowledge while remaining focused on classroom practice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interesting Interlude: The role was a chance to try something different for a while.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Something Else (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you chose **Something Else:** Why did you apply for the role?

Any further comments on your **rationale** for applying for the AST role.

Q2 The following statements are related to what extent the **initial** New Appointments National Panel (NANP) application process and information provided supported your understanding of the across-schools-teacher.

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
I was provided with explicit information about the AST role that informed my decision to apply.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found the <u>written application</u> process strengthened my understanding of the AST role.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found the <u>NANP interview</u> process strengthened my understanding of the AST role.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on the **Initial Application** process and your initial understanding of the AST role.

Q3 The following statements are related to those AST who have been through the New Appointments National Panel (NANP) **re-appointment** process after they have completed their first two years and whether the process was beneficial as a reflective process on your effectiveness as an AST.

If you have not been through a NANP re-appointment process, then please choose the **Not Applicable** option BELOW and continue onto the next question.

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
I was provided with explicit information about the re-appointment process and what was required of me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found the written re-appointment process beneficial as a reflective process on my effectiveness in the AST role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found the NANP re-appointment interview process beneficial as a reflective process on my effectiveness in the AST role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I have **NOT** been through a re-appointment process yet (select the **Not Applicable** option below)

☐ **Not Applicable**

Any further **re-appointment** process comments.

INTRO The following section requires you to consider the different types of teacher-leader practices you have developed in your role. These practices have been selected as they are described in the research literature as those linked to improved student achievement outcomes.

Q4A Please rate the extent you believe 'Brokering' is / was a successful function of your AST role.

BROKERING:

- managing how teachers **translate the principles of school improvement into practice** in their own classrooms to ensure that links within and across schools are strong and that opportunities for meaningful development among teachers are maximised.

	Extremely Successful	Very Successful	Somewhat Successful	Not successful
Kāhui Ako Within School (WST) Teachers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Teachers' (that were not WSTs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on **Brokering**.

Q4B Please rate the extent you believe 'Participation' is / was a successful function of your AST role.

PARTICIPATION:

- ensuring colleagues feel part of, and own, change and improvement;
 - fostering collaborative ways of working with colleagues to shape school improvement efforts and
 - take the lead in guiding colleagues toward a collective goal.

	Extremely Successful	Very Successful	Somewhat Successful	Not Successful
Kāhui Ako Operational Team: Other ASTs and the Kāhui Ako Leader/s	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kāhui Ako Within-school-teachers (WST)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Teachers' (that were not WSTs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Middle-leaders: such as Team Leaders, Curriculum Leaders, Deans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior-leaders: Principals, Deputy, Assistant and Associate Principals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on **Participation**.

Q4C Please rate the extent you believe ‘Mediating’ is / was a successful function of your AST role.

MEDIATING: being a **source** of expertise and information yourself (and drawing on additional expertise and external assistance) for the benefit of others.

	Extremely Successful	Very Successful)	Somewhat Successful	Not Successful
Kāhui Ako Operational Team: Other ASTs and the Kāhui Ako Leader/s	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kāhui Ako Within-school-teachers (WST)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Teachers’ (that were not WSTs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Middle-leaders: such as Team Leaders, Curriculum Leaders, Deans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior-leaders: Principals, Deputy, Assistant and Associate Principals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ākonga / Students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Whānau including parent representative with BOT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on **Mediating**.

Q4D Please rate the extent you believe 'Relationships' is / was a successful function of your AST role.

RELATIONSHIPS: forging respect and rapport with individuals, to underpin mutual learning.

	Extremely Successful	Very Successful	Somewhat Successful	Not Successful
Kāhui Ako Operational Team: Other ASTs and the Kāhui Ako Leader/s	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kāhui Ako Within- school-teachers (WST)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Teachers' (that were not WSTs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Middle-leaders: such as Team Leaders, Curriculum Leaders, Deans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Senior-leaders: Principals, Deputy, Assistant and Associate Principals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ākonga / Students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Whānau including parent representative with BOT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on **Relationships**.

INTRO The following section relates to Kāhui Ako across-schools-teacher as **teacher-leaders** and how that experience influences professional identity.

Q5 The following three phases are part of the research literature in relation to **professional identity: Experimentation, Validation, and Confirmation**. Please indicate which phase would **BEST** describe where you would see yourself right now in your AST role.

	Describes me extremely well	Describes me very well	Describes me moderately well	Describes me slightly well	Does not describe me
Experimentation: I am trying on the role and deciding whether being an AST is a fit for me?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Validation: I am confident that the AST role is a good fit for me, and I am now seeking validation from others. Do others think the AST is a fit for me?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confirmation: Others and I see me / or saw me as an Across-School-Teacher.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on how you identify with / or have identified yourself as an AST:

Q6 Please indicate where you would rate your personal experience of being **respected, valued, and recognised** as a Kāhui Ako across-schools-teacher (AST).

	Describes my experience extremely well	Describes my experience well	Describes my experience moderately well	Describes my experience slightly well	Does not describe my experience
I feel/felt RESPECTED as an AST practitioner by my colleagues .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel/felt RESPECTED as an AST practitioner by my OWN Principal and senior-leaders in my school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel/felt RESPECTED as an AST practitioner by the OTHER Principals and senior-leaders in the Kāhui Ako.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel/felt VALUED as an AST practitioner by my colleagues .	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel/felt VALUED as an AST practitioner by my OWN Principal and senior-leaders in my school. (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel/felt VALUED as an AST practitioner by the OTHER Principals and senior-leaders in the Kāhui Ako. (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have been RECOGNISED and REWARDED as an AST practitioner by my OWN Principal and senior-leaders in my school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have been RECOGNISED and REWARDED as an AST practitioner by the OTHER Principals and senior-leaders in the Kāhui Ako.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Any further comments on your experience of being **respected, valued, recognised, and rewarded** as an AST.

Q7A What have been any ongoing **influences** (*either positive or negative*) that have made a **significant impact** on how you have been / or were able to perform in your role as an across-schools-teacher?

Q7B What have been any **critical incidents or key events** (*either positive or negative*) that have made a **significant impact** on how you have been / or were able to perform in your role as an across-schools-teacher?

Is there anything else that you would like to add about **your personal experience** of being an across-schools-teacher?

Appendix B: Participant Questionnaire Information Sheet (PIS)



**EDUCATION AND
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Private Bag 92601
Symonds Street
Auckland 1135
New Zealand

PARTICIPANT QUESTIONNAIRE INFORMATION SHEET

You are invited to participate in a study being conducted by Julia Tod, a Ph.D. Candidate in the Department of Education and Social Work at the University of Auckland.

Invitation to participate: Participation in this study is entirely voluntary. You may refuse to take part in the research or exit the survey at any time without penalty. You may skip any questions you do not wish to answer for any reason other than the giving consent question. Participation is by way of electronic questionnaire and should take approximately 20 minutes to complete.

Research Title: Teacher-Leadership: lived experiences of Kāhui Ako | Community of Learning Across-School-Teachers

The aim of this research: is to investigate teacher-leadership government initiatives, in particular that of Communities of Learning - Kāhui Ako and the specific new role of the Across-School-Teacher.

Researcher Introduction and purpose of this research: My name is Julia Tod, and I am currently a student at the University of Auckland Faculty of Education undertaking a Doctor of Philosophy. I was the first Kāhui Ako Across-School-Teacher (AST) employed in New Zealand in 2016. I have also continued to work closely with other Across-School-Teachers in my current role in the Ministry of Education as an Auckland Kāhui Ako Lead Adviser. I have a great interest and interconnection to this relatively new alternative career pathway leadership role. My moral purpose is to give a voice to those that have experienced the Across School Teacher role in the hope to positively inform any further governmental teacher-leadership initiatives.

Benefits and identified risks of this study: You will receive no direct benefits from participating in this research study. However, your responses may help us learn more about the experience of the AST role. There are no foreseeable identified risks involved in participating in this study.

Confidentiality: Be assured that extra care will be taken to ensure that in no way would individuals or specific Communities of Learning - Kāhui Ako be identified in the reported data. Your survey answers

will be stored initially with *Qualtrics* in a password protected electronic format. Data will later be downloaded and stored securely.

Data Storage, Retention, Destruction and Future Use: Only those directly involved in the research - I and my supervisors will have access to this data. The findings from the data will be submitted as a thesis to fulfil the requirements of a Doctor of Philosophy, may be written up for future publications and may be used for educational presentations. The electronic data will be stored on the researcher's password-protected computer until the data analysis is completed, and the research report has been written then all electronic data files will be destroyed. At the end of the questionnaire, participants will be asked if they are interested in taking part in an additional follow up interview by phone, Skype or in person. If participants choose to do so a separate link is provided, in an effort to protect the anonymity of the survey responses, for the participant to provide contact information for the researcher, such as a phone number or email address. Names or identifying information gathered from the study will remain confidential and would not be included in any publications or presentations.

Contact Details and Approval: Should you require further information or clarification please feel free to contact the following people:

Student Researcher	Student Supervisors	Head of School
Julia Tod jtod009@aucklanduni.ac.nz	Dr Rebecca Jesson Faculty of Education & Social Work +64 9 373 7999 ext. 48541 r.jesson@auckland.ac.nz Dr. Camilla Highfield Faculty of Education & Social Work +64 9 373 7999 ext. 48929 c.highfield@auckland.ac.nz	Associate Professor Katie Fitzpatrick Faculty of Education & Social Work +64 9 373 7999 ext. 48652 k.fitzpatrick@auckland.ac.nz
For any queries regarding ethical concerns, you may contact the Chair, University of Auckland Human Participants Ethics Committee, Ethics and Integrity Team, University of Auckland, Private Bag 92019, Auckland 1142. Telephone 09 373-7599 ext. 83711. Email: humanethics@auckland.ac.nz		

APPROVED BY THE UNIVERSITY OF AUCKLAND HUMAN ETHICS PARTICIPANTS COMMITTEE ON 30 JANUARY 2020 REFERENCE NUMBER: 024139

Appendix C: Community of Learning | Kāhui Ako Leader Consent Form



**EDUCATION AND
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Private Bag 92601
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Auckland 1135
New Zealand

COMMUNITY OF LEARNING | KĀHUI AKO LEADER CONSENT FORM

This form will be stored securely for six years

Research Title: Teacher-Leadership: lived experiences of Community of Learning | Kāhui Ako
Across-School-Teachers

Researcher: PhD Candidate, Julia Tod

University of Auckland Supervisors: Dr Rebecca Jesson and Dr Camilla Highfield

In giving my consent, I acknowledge and agree to:

- a) I have read the Participant Information Sheet (PIS) and understand the intention of the study.
The researcher has given me the opportunity to discuss the study and ask any questions and they have been answered to my satisfaction.
- b) I understand that participation in this study is entirely voluntary.
- c) I give my permission for the researcher to approach current and recently employed Across School Lead Teachers of the Community of Learning - Kāhui Ako as potential participants, it is up to the potential participants to consider and consent themselves to the study.
- d) I give my assurance that participation or non-participation of participants will not affect their employment status or relationship within the Community of Learning - Kāhui Ako.
- e) I understand the Community of Learning - Kāhui Ako may withdraw consent at any time without needing to give a reason up until the invitation email has been sent to potential participants.
- f) I agree that the data gathered will be used for the researcher's thesis and / or future publications.
- g) I understand that only the researcher and the University of Auckland supervisors of this study will have access to the data for the purpose of analysis.

- h) I understand that the participants and the Community of Learning - Kāhui Ako will not be named in the published research findings. I understand that while the research findings are confidential and all efforts will be taken for anonymity, identification of groups or individuals may be identified due to the nature of the participants' responses.
- i) I understand this form will be stored in a secure cabinet for six years and then will be shredded in a secure destruction facility. The electronic data will be stored on the researcher's password protected computer until the data analysis has been completed. All electronic data files will then be deleted.
- j) I understand that the researcher will provide the Community of Learning - Kāhui Ako with a summary of the research findings that can be made available to all participants and interested parties.
- k) I understand that if I have further questions relating to the Community of Learning - Kāhui Ako's participation in this research I may contact the researcher directly.

Please complete the following details, sign and return this consent form to the researcher:

Name of Community of Learning - Kāhui Ako:
Name of Leader:
Signature:
Date:

APPROVED BY THE UNIVERSITY OF AUCKLAND HUMAN PARTICIPANTS COMMITTEE
ON 30 JANUARY 2020 REFERENCE NUMBER: 02413

Appendix D: Phase 2: Participant Interview Information Sheet (PIS)



**EDUCATION AND
SOCIAL WORK**

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Symonds Street
Auckland 1135
New Zealand

PARTICIPANT INTERVIEW INFORMATION SHEET

You are invited to participate in a study being conducted by Julia Tod, a Ph.D. Candidate in the Department of Education and Social Work at the University of Auckland.

Invitation to participate: Participation in this study is entirely voluntary. You may refuse to take part in the research or end the interview at any time without penalty. You may skip any questions you do not wish to answer for any reason. Participation is by way of an interview which should take approximately 60 to 90 minutes to complete.

Research Title: Teacher-Leadership: lived experiences of Community of Learning | Kāhui Ako Across-School-Teachers

The aim of this research: is to investigate teacher-leadership government initiatives, in particular that of Communities of Learning - Kāhui Ako and the specific new role of the Across-School-Teacher.

Researcher Introduction and purpose of this research: My name is Julia Tod, and I am currently a student at the University of Auckland Faculty of Education undertaking a Doctor of Philosophy. I was the first Kāhui Ako Across-School-Teacher (AST) employed in New Zealand in 2016. I have also continued to work closely with other Across-School-Teachers in my current role in the Ministry of Education as an Auckland Kāhui Ako Lead Adviser. I have a great interest and interconnection to this relatively new alternative career pathway leadership role. My moral purpose is to give a voice to those that have experienced the Across School Teacher role in the hope to positively inform any further governmental teacher-leadership initiatives.

Benefits and identified risks of this study: You will receive no direct benefits from participating in this research study. However, your responses may help us learn more about the experience of the AST role. There are no foreseeable identified risks involved in participating in this study.

Confidentiality: Be assured that extra care will be taken to ensure that in no way will individuals or specific Communities of Learning - Kāhui Ako would be identified in the reported data. Your

interview answers will be stored in a password protected electronic format. Data will later be downloaded and stored securely.

Data Storage, Retention, Destruction and Future Use: Only those directly involved in the research - I and my supervisors will have access to this data. The findings from the data will be submitted as a thesis to fulfil the requirements of a Doctor of Philosophy, may be written up for future publications and may be used for educational presentations. The electronic data will be stored on the researcher's password-protected computer until the data analysis is completed, and the research report has been written then all electronic data files will be destroyed. No names or identifying information would be included in any publications or presentations based on these data, and your responses to this interview will remain confidential.

Contact Details and Approval: I would be very grateful if you would give this request serious consideration. Should you require further information or clarification please feel free to contact the following people:

Student Researcher	Student Supervisors	Head of School
Julia Tod jtod009@aucklanduni.ac.nz	Dr Rebecca Jesson Faculty of Education & Social Work +64 9 373 7999 ext 48541 r.jesson@auckland.ac.nz Dr. Camilla Highfield Faculty of Education & Social Work +64 9 373 7999 ext 48929 c.highfield@auckland.ac.nz	Associate Professor Katie Fitzpatrick Faculty of Education & Social Work +64 9 373 7999 ext 48652 k.fitzpatrick@auckland.ac.nz
For any queries regarding ethical concerns you may contact the Chair, University of Auckland Human Participants Ethics Committee, Ethics and Integrity Team, University of Auckland, Private Bag 92019, Auckland 1142. Telephone 09 373-7599 ext. 83711. Email: humanethics@auckland.ac.nz		

APPROVED BY THE UNIVERSITY OF AUCKLAND HUMAN ETHICS PARTICIPANTS COMMITTEE ON 30 JANUARY 2020 REFERENCE NUMBER: 024139

Appendix E: Phase 2: Participants Interview Information, Electronic Consent and Demographics Collection Form



**EDUCATION AND
SOCIAL WORK**

PARTICIPANT QUESTIONNAIRE INFORMATION SHEET AND ELECTRONIC CONSENT

You are invited to participate in a study being conducted by Julia Tod, a Ph.D. Candidate in the Department of Education and Social Work at the University of Auckland.

Invitation to participate: Participation in this study is entirely voluntary. You may refuse to take part in the research or exit the survey at any time without penalty. You may skip any questions you do not wish to answer for any reason other than the giving consent question. Participation is by way of electronic questionnaire and should take approximately 20 minutes to complete.

Research Title: Teacher-Leadership: lived experiences of Community of Learning | Kāhui Ako Across-School-Teachers

The aim of this research: is to investigate teacher-leadership government initiatives, in particular, that of Communities of Learning - Kāhui Ako and the specific new role of the Across-School-Teacher.

Researcher Introduction and purpose of this research: My name is Julia Tod, and I am currently a student at the University of Auckland Faculty of Education undertaking a Doctor of Philosophy. I was the first Kāhui Ako Across-School-Teacher (AST) employed in New Zealand in 2016. I have also continued to work closely with other Across-School-Teachers in my current role in the Ministry of Education as an Auckland Kāhui Ako Lead Adviser. I have a great interest and interconnection to this relatively new alternative career pathway leadership role.

My moral purpose is to give a voice to those that have experienced the Across School Teacher role in the hope to positively inform any further governmental teacher-leadership initiatives.

Benefits and identified risks of this study: You will receive no direct benefits from participating in this research study. However, your responses may help us learn more about the experience of the AST role.

There are no foreseeable identified risks involved in participating in this study.

Confidentiality: Be assured that extra care will be taken to ensure that in no way would individuals or specific Communities of Learning - Kāhui Ako be identified in the reported data. Your survey answers will be stored initially with Qualtrics in a password protected electronic format. Data will later be downloaded and stored securely.

Data Storage, Retention, Destruction and Future Use: Only those directly involved in the research - myself and my supervisors will have access to this data. The findings from the data will be submitted as a thesis to fulfil the requirements of a Doctor of Philosophy, may be written up for future publications and may be used for educational presentations. The electronic data will be stored on the researcher's password-protected computer until the data analysis is completed, and the research report has been written then all electronic data files will be destroyed. At the end of the questionnaire, participants will be asked if they are interested in taking part in an additional follow up interview by phone, Skype or in person. If participants choose to do so a separate link is provided, in an effort to protect the anonymity of the survey responses, for the participant to provide contact information for the researcher, such as a phone number or email address. Names or identifying information gathered from the study will remain confidential and would not be included in any publications or presentations.

Contact Details and Approval: Should you require further information or clarification please feel free to contact the following people:

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For any queries regarding ethical concerns, you may contact the Chair, University of Auckland Human Participants Ethics Committee, Ethics and Integrity Team, University of Auckland, Private Bag 92019, Auckland 1142. Telephone 09 373-7599 ext. 83711. Email: humanethics@auckland.ac.nz

APPROVED BY THE UNIVERSITY OF AUCKLAND HUMAN PARTICIPANTS COMMITTEE
ON 30 JANUARY 2020 REFERENCE NUMBER:024139

Clicking on the “Yes I **Agree**” button indicates that:

- I have read the Interview Participant Information Sheet (PIS) above and understand the intention of the study.
- I understand that only the researcher and the University of Auckland supervisors of this study will have access to the data for the purpose of analysis.

- c) I agree that the data gathered will be used for the researcher's thesis and / or future publications.
- d) I understand that the participants will not be named in the published research findings. However, I understand that while the research findings are confidential and all efforts will be taken for anonymity, identification of groups or individuals may be identified due to the nature of the participants' responses.
- e) I understand that if I have further questions relating to participation in this research, I may contact the researcher directly.
- f) I voluntarily agree to participate and understand I can exit the questionnaire at any stage before the Submit option.
- g) I am 18 years of age or older.
 - Yes I Agree
 - No I do not Agree

Demographics. This section is for demographic purposes for data result analysis not for an indicator to identify participants or any Kāhui Ako.

i. Are you currently employed as a Kāhui Ako Across-School-Teacher (AST) OR were you previously employed as an Across-School-Teacher?

- Currently employed as Across-School-Teacher (AST)
- Previously employed as Across-School-Teacher (AST)

ii Please indicate your gender.

- Male
- Female
- Would rather not disclose.

iii Please indicate your age.

- 19 years of age or under
- Between 20 - 29 years of age
- Between 30- 39 years of age
- Between 40 - 49 years of age
- Between 50 - 60 years of age
- Over 61 years of age

iv Please indicate your ethnicity.

- NZ European
- NZ Māori
- Pasifika
- Asian
- Other

v, Please indicate the general geographical area within New Zealand that the Kāhui that you are / were employed in is located by choosing your closest city.

- Auckland
- Hamilton
- Rotorua
- Whanganui
- Palmerston North
- Wellington
- Nelson
- Christchurch
- Dunedin
- Invercargill
- Other

vi Which description best describes the Kāhui Ako you were / are in employed in:

- A **large** mostly urban Kāhui Ako (10 or more schools)
- A **medium** sized mostly urban Kāhui Ako (between 4 and 9 schools)
- A **small** mostly urban Kāhui Ako (3 schools or less)
- A **large** mostly rural Kāhui Ako (10 or more schools)
- A **medium** sized mostly rural Kāhui Ako (between 4 and 9 schools)
- A **small** mostly rural Kāhui Ako (3 schools or less)

vii How long, have you been OR were you in the role of Across-School-Teacher (AST)?

- Less than 6 months
- Less than 12 months
- More than 12 months but less than 2 years
- More than 2 years but less than 4 years
- More than 4 years

viii How many OTHER Across-School-Teachers (AST) are / were also employed at the SAME time as you?

- None (I am / was the only AST)
- One other
- Two others
- Three others
- Four others
- Five others
- More than Five others (please indicate how many in the box below)

ix **Approximately** how many Within-School-Teacher (WST) were also employed in the Kāhui Ako while you have been / were as AST?

- Between 1 and 5
- Between 6 and 10
- Between 11 and 15
- Between 16 and 20
- Between 21 and 25
- Between 26 and 30
- More than 30 (please indicate how many in the box below)

x **Classroom teaching school level:** please indicate the level of schooling that you are / were **teaching** as a classroom teacher while you are / were an Across-School-Teacher (AST)

- Lower Primary: New Entrant to Year 3
- Middle Primary: Year 3 to Year 6
- Senior Primary: Year 7 to Year 8
- Secondary School: Year 9 to Year 13

xi In what roles did you have **previous** middle-leadership experience?

- Team Leader
- Syndicate Leader
- Curriculum Leader
- Head of Department
- Dean
- SENCO
- Not Applicable
- Any other positions not mentioned above (please use the text box below).

Appendix F: Moustakas (1994) Phenomenological Epoché Example

J Tod Reflection 25/04/20

“By returning to whatever is there in...memory, perception, judgment, feeling, whatever is actually there” (Moustakas, 1994, p.84).

My background, beliefs, biases, and presumptions

I am the human instrument during this transcendental phenomenological study, all writing will be in my voice. My voice is influenced by my past experiences and personal thinking processes. This reflection will cover; my background, personal experiences, what I have observed about the AST role and what I expect from the interviews.

Recalling my own personal and professional teacher-leader experience especially in relation to Kāhui Ako...my background includes being both a primary and secondary teacher for over 20 years. I was part of one of the very first Communities of Schools (as was originally named) that was set up and the first AST appointed nationally in 2016. This was a formative experience for me and is instrumental to my motivation to undertake this research. I had previously been a middle leader in curriculum, pastoral, and professional development roles – Department-Leader of Transition and Tourism, Professional Development Leader, and a Specialist Classroom Teacher at two large secondary schools. I have spent a large part of my career supporting my colleagues and leading teams including in my current role within the Ministry of Education as a Kāhui Ako Lead Adviser. I completed my master’s in professional studies dissertation on novice teachers and their experience of their induction and mentoring programme which at the time I was responsible for. I have an innate drive to advocate for those that are starting new experiences for the journey to be the best it can be and as they deserve.

One of the most challenging aspects to accepting the AST role was having a vague national job description that no-one had seen in action before - therefore difficult to validate by others. The questions of who I was, and just as importantly who I was not, were rather ambiguous and I needed to be the one who owned and directed the narrative. I was very grateful to have the full mentoring support of my Principal and immediate DP line manager. My previous leadership and coaching experience were crucial to my confidence, ability, and role success. I felt and experienced other people’s scepticism of COL within my own school and across the other schools, as well as professional jealousy of the role especially in comparison to other leadership positions. I do feel the endorsement by my Senior-leadership team, my professional reputation and standing made a significant difference to how the role, and me in it, was seen and accepted. The struggles for me to perform my role were related to power plays at all levels of leadership, the mixed level of genuine commitment to the COL and collaborative practice compared to just banking the resourcing by schools. The successes included seeing everyday classroom teachers grow in their ability and confidence to try new things and then share with others through inquiry and the de-

privatisation of classrooms. Both lateral (across departments and year levels) and linear (along the student pipeline) teacher connections for the best interest of students was fantastic to see and personally professionally rewarding.

What I have observed both with fellow ASTs I personally worked with in my own COL and since being in my MOE role is that for every AST it is a very personal and different experience. I have seen some incredible success stories where the role has been a gift to the teacher-leader, and they have thrived and gone from strength to strength. I have also seen some really concerning, even disturbing, situations where the ASTs are professionally unsafe and have become disillusioned, disheartened, disgruntled, even bitter about their experience. This inconsistency weighs heavily on me and drives my moral imperative professionally in my job and as a researcher. I am expecting to see this disparity in the transcripts of the interviews.

I am also interested to see how each participant interprets who they are and what their purpose in the role is - whether they see themselves in the 'service' of others, to give support, coach, work alongside OR whether they see themselves as 'tellers' of others and inadvertently just make themselves and others 'busy' to validate their role. I also have wonderings about how they consider and work with, or not, within-school-teachers. I am expecting a difference in how each participant relates with other middle, and senior-leaders, and Principals - both internally and across the Kāhui Ako. I expect there to be a difference between primary and secondary ASTs functionality of the role.

Appendix G: Phase 2: Participant Demographics

Participant Code	Gender	Years of Age	Ethnicity	Sector Representation	Time in the AST role
IntP7	Male	30 - 39	Other	Upper Primary Y7-8	>12 months but < 2 years
IntP8	Female	40 - 49	NZ European	Lower Primary NE-Y3	>12 months but < 2 years
IntP14	Male	40 - 49	Other European	Secondary Y9-13	< 12 months
IntP15	Female	50 - 60	NZ European	Secondary Y9-13	>12 months but < 2 years
IntP16	Female	40 - 49	NZ European	Upper Primary Y7-8	>2 years but < 4 years
IntP18	Male	30 - 39	NZ European	Upper Primary Y7-8	>12 months but < 2 years
IntP24	Male	40 - 49	NZ European	Secondary Y9-13	>2 years but < 4 years
IntP26	Female	40 - 49	NZ European	Secondary Y9-13	>12 months but < 2 years
IntP27	Female	50 - 60	NZ European	Middle Primary Y3-6	>2 years but < 4 years
IntP28	Male	40 - 49	NZ European	Middle Primary Y3-6	>12 months but < 2 years
IntP30	Male	50 - 60	NZ European	Secondary Y9-13	< 12 months
IntP31	Male	30 - 39	NZ European	Secondary Y9-13	>2 years but < 4 years
IntP32	Male	30 - 39	NZ European	Upper Primary Y7-8	>12 months but < 2 years
IntP33	Female	50 - 60	NZ Māori	Middle Primary Y3-6	>2 years but < 4 years
IntP36	Female	50 - 60	NZ Māori	Upper Primary Y7-8	>12 months but < 2 years
IntP38	Female	40 - 49	Other	Lower Primary NE-Y3	>2 years but < 4 years
IntP40	Female	50 - 60	NZ European	Secondary Y9-13	>2 years but < 4 years
IntP42	Female	50 - 60	NZ Māori	Secondary Y9-13	< 6 months
IntP43	Female	30 - 39	NZ Māori	Upper Primary Y7-8	< 6 months
IntP44	Female	40 - 49	NZ European	ECE - Lower Primary	< 12 months
IntP45	Female	40 - 49	NZ European	Lower Primary NE-Y3	>2 years but < 4 years
IntP47	Male	Over 61	NZ European	Secondary Y9-13	>2 years but < 4 years
IntP48	Female	40 - 49	NZ European	Secondary Y9-13	< 12 months
IntP49	Female	50 - 60	NZ European	Lower Primary NE-Y3	>2 years but < 4 years
IntP52	Female	50 - 60	NZ European	Secondary Y9-13	< 6 months
IntP53	Female	50 - 60	NZ European	Secondary Y9-13	>2 years but < 4 years
IntP54	Male	40 - 49	NZ European	Secondary Y9-13	>12 months but < 2 years
IntP55	Male	40 - 49	NZ European	Middle Primary Y3-6	< 6 months

Appendix H: Interview Introduction and Question Script

Offline before recording starts - a general 'get to know you' - asking about how they have been during COVID lockdown and to make the participant feel comfortable and build a rapport.

With your agreement I am going to record this interview - the Zoom functionality allows me to video and record audio and then automatically transcribes. Which I can send you copies of if you so wish. So shortly you will hear that functionality starting with a voice saying, "this meeting is being recorded" and a notification that you will need to accept.

START RECORDING

Kia ora_____ welcome to your across-schools-teacher interview. Thank you so much for agreeing to this conversation. Your voice as part of this research about this relatively new role in New Zealand is crucial. As I'm sure you know, research is based on a study theory. I've chosen what's called a transcendental phenomenological methodology. What that basically means is I'm going to ask you three very open and broad questions, there's obviously no right or wrong answers. And I want you to share what's important for you to share. Being an Across the Schools Teacher is a very personal journey and so I would just like you to take this interview where you feel you would like it to go, and I will ask a few further probing questions that are responsive to where our conversation goes so that I can fully understand your experience.

So, my first question prompt is: *Tell me how you came to be an AST?*

Which leads to my second question: *Tell me what it is (was) like to be an AST?*

Third question: *What would you advise your former self from where you stand now?*

Final question: *Knowing we were going to meet today is there any other points or messages you would like noted as part of this research?*

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