

School Leaders' Instructional Leadership After a Change in Assignment:  
*An exploration of school leaders' instructional effectiveness in the transition between  
school settings*

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A Capstone Project

Presented to

The Faculty of the Fred S. Klipsch Educators College

Marian University

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In Partial Fulfillment of the Requirements for the Degree

Doctor of Education in Organizational Leadership

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by

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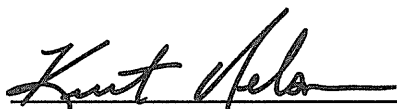
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APPROVAL OF THE CAPSTONE PROJECT

This capstone project, ("School Leaders' Instructional Leadership After a Change in Assignment"), has been approved by the Graduate Faculty of the Fred S. Klipsch Educators College in partial fulfillment of the requirements for the degree of Doctor of Education.

  
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Date December 12, 2022

## DEDICATION

This capstone project is dedicated to my family and supporters that have been routinely supportive during this entire process. Their source of support has been unwavering as they have pushed me to be the absolute best I can be. This work is also dedicated to my parents, Vicki and James, and my grandmother, Lois, who have always quietly pushed and challenged me to keep going. They have granted me the autonomy and freedom to be my absolute best as long as I was moving forward.

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## STUDY DESCRIPTION

## **Introduction**

Instructional leadership can be conceptualized as the leadership approach wherein the school leader collaborates with teachers, to provide both support and guidance to establish the best teaching practices for students (Brolund, 2016). At its core, instructional leadership is student-oriented, as the collaboration between the teachers and the principal is intended to ensure that the student has the best learning experience that can create the desired competencies (Spillane et al., 2003). In instructional leadership, the role of the school leader is not solely to provide instruction to the teachers, but to work in conjunction with them and to provide them with the necessary professional development tools that can enhance their pedagogical approaches and practices.

Against this background, the present exploration sought to understand the determinants of instructional leadership effectiveness, in the context of school administrators who were transitioning now, or who have transitioned between school settings within the last 5 years. For this study, school leaders can be either a principal or an assistant principal, specifically. Additionally, when referencing a transition in this study, the transition referenced is referring to the transition from elementary (Pre-Kindergarten to 6<sup>th</sup> Grade) to secondary (7<sup>th</sup> Grade to 12<sup>th</sup> Grade) school or the vice versa, secondary school (7-12) to elementary school (K-6). Before conducting any research on the topic, it was important to ascertain the extent to which the concept of instructional leadership was deemed pertinent by school leaders, and whether there were any

noteworthy differences in how instructional leadership is employed in elementary versus secondary school environments. To this end, I reached out to school leaders who have experienced transition within the last 5 years for just an off-the-record chat. The topics of my conversations are expounded on subsequently, before a brief consideration of current knowledge on the topic and a statement on the importance and significance of the research.

### **Diagnostic Work**

In order to ascertain school leaders' perspectives about the transition from one school environment to another, administrators who had already made such a transition were asked in casual diagnostic conversation to give some detailed information about their experiences. Information was gathered from ten administrators who are experienced in leadership positions in both elementary and high school environments, transitioning from one to the other in either direction. A diverse group in terms of age, gender, and ethnic identity was selected to ensure the study understood multiple perspectives. At a general level, the questions sought to determine definitions of instructional leadership; how it is used in elementary and secondary school environments; any differences and parallels in instructional leadership in the two pedagogical environments; as well as the skills or other forms of preparation that the school leaders in transition deem effective in the elementary and/or secondary school contexts. Some of the questions asked in the informal discussion were:

- What does instructional effectiveness mean to you?

- How long were you an elementary leader? Secondary leader?
- How would you describe elementary instructional practices? Secondary instructional practices?
- What is the leader's role instructional at each level?
- At which level do you feel most effective? (Elementary or secondary)
- What does instructional monitoring look like at the elementary level? Secondary?
- Did one experience (setting) prepare you for the other, instructional?
- What skills were you able to transfer from one setting to the other, contributing to your effectiveness?
- Were the instructional portions of your own administrator evaluation in each setting similar? In what ways did the evaluation expectations differ between levels?
- As an elementary/secondary school leader, describe the role of each team member: Department Chair, Literacy Coach, Teacher Leader, Assistant Principal? Principal? Dean?
- What support did you need during your transition? How did the district meet your needs? What was missing?
- Were you afforded/provided a mentor for your transition? (Yes, no, option 3)
- Did you have a transition plan? (Yes, No).

- How many years of experience do you have as a principal/assistant principal/dean at the elementary level? Secondary level?
- How do you identify? (Male, Female, Other, I prefer not to answer)
- How do you identify? (Black, White, Latino, Other)
- Did you transition from administration in an elementary (K-6) to secondary (7-12) school or from secondary to elementary? (Elementary to Secondary; or Secondary to Elementary)
- When you transitioned from one level to the next, was it in the same district or a different district? (Same district; or Different district)
- How would you describe the setting where you currently lead?

These diagnostic questions helped gain a better preliminary understanding of instructional leadership in elementary and secondary school environments from the perspective of school leaders who have recently experienced transition. This was done before starting the actual formal study. Moreover, this information was useful in highlighting some important themes that can be used to understand the determinants of instructional leadership efficacy before, during, and after the transition from elementary leadership to high school leadership, or vice versa, from high school to elementary leadership.

### **Emerging Themes on Instructional Leadership for School Leaders in Transition**

Instructional leadership implicitly underscores the importance of the leadership styles that are used by school leaders, as this determines the nature of their interaction with teachers, students, and other stakeholders. The leaders who were contacted also corroborated the importance of leadership styles in general, in response to probes on the determinants of institutional effectiveness. Therefore, understanding the leadership styles that are used by school leaders is pertinent to instructional leadership, as it is consistent with the ‘what’ aspect of leadership that leads to instructional effectiveness. According to the existing literature, the leadership styles that are predominantly associated with instructional leadership success are transformational leadership and servant-oriented leadership (Adarkwah & Zeyuan, 2020; Dussault et al., 2008; Williams & Hatch, 2012). The value of these approaches is that they each instill a perspective that the school leader needs the ability to collaborate with followers, thereby differing starkly from leadership approaches that emphasize a hierarchical structure (Greenleaf, 1977; Burns, 1978).

The second critical determinant of instructional leadership efficacy is the existence of a shared mission within the learning institution. A shared mission is important because it aligns the efforts of the teachers and school leaders with measurable and specific objectives, which is critical considering the definition of instructional leadership (Hoe, 2007; Castelli, 2011). As noted earlier, instructional leadership seeks to ensure that the best outcomes for the student are observed, thereby implicitly placing

emphasis on the institutional prerogative to learn what students need, and how they can succeed.

Therefore, the third critical determinant of instructional leadership efficacy is the extent to which the school leader manages the instructional program and how those actions are embedded within the institutional culture. A learning organization is important because it shapes the nature of effort that organizational members will exert to achieve common objectives, in addition to determining the cultural environment that shapes attitudes, beliefs, and perceptions about learning (Heorhiardi et al., 2014; Fiol and Lyles, 1985).

The fourth critical determinant of instructional leadership efficacy pertains to the school leader developing a positive learning climate. Developing a positive learning climate is one way the school leader can examine his or her own beliefs associated with instructional effectiveness. This is important because it ensures that the school leader can support alternative views that may be important, useful, or relevant (Castelli, 2011).

Current research supports the idea that instructional leadership in elementary school environments is predicated on a process of social construction (Spillane et al., 2003). The implication is that school leaders in elementary school environments must have the ability to leverage the social, human, cultural, and economic capital available to achieve instructional leadership efficacy (Spillane et al., 2003). In contrast, instructional leadership within the secondary school environment is largely based on a model of distributional leadership, in which the school leader and the teachers share the

responsibility to make decisions, based on a thorough understanding of internal and external factors (Hulpia et al., 2009; Huong, 2020). Overall, the current knowledge on instructional leadership isolates specific themes that can determine its efficacy, as well as highlights some broad differences between the elementary and secondary school environments.

### **Importance and Significance of the Study**

The importance of this study is to provide useful information that can be used as a practical guideline by school leaders in transition from either elementary school to high school or vice versa, high school to elementary. Moreover, the study specifies the methods and leadership themes that are positively correlated with instructional leadership, implying a degree of practical relevance. The study is also significant because it draws connections between self-reflections by the school leader and how they collectively influence instructional leadership. It, therefore, draws on a broad range of literature that is useful in providing a holistic and comprehensive understanding of instructional leadership. The study is also important because it embeds the narratives and experiences of school leaders who have transitioned from elementary to high school or high school to elementary school, thereby facilitating the ability to bridge the gap between theory and the reality experienced by school leaders who have transitioned. In addition, the study can shape pedagogical and leadership approaches that are used in both elementary and secondary school environments, which is important because the knowledge can be used to enhance students' learning outcomes. This particular study is



significant because of its practical relevance and usefulness for school leaders who may wish to transition from one school environment to another, as they can become cognizant of the differences and overlaps that will influence their instructional leadership, during and after the transition. Finally, this can also help district leaders in that after transitioning themselves and having self-awareness and experience with the transition, they can pass on their own knowledge and assist others in their transitions.

## LITERATURE REVIEW

The purpose of this literature review is to examine prior research underlying the instructional effectiveness of school leaders, as well as explore the topics within the research and how they pertain to transitional leadership. Instructional leadership can be conceptualized as a collaboration between the school leader and the teachers, intended to provide support and guidance in the establishment of best pedagogical practices (Mehmet, 2016). Therefore, instructional leadership is oriented towards achieving the best learning outcomes for the students, by aligning pedagogical practices with the learning needs of the student population. The insights drawn from existent literature will be invaluable in shaping an understanding of how school leaders exercise instructional leadership in schools and adapt from one school environment to another, to maintain a degree of instructional leadership.

Another critical contextual background of the literature review is the diagnostic work that was conducted with school leaders who have already transitioned from one school environment to another, to explore their perspectives on instructional leadership and how it differs in the two contexts, anecdotally. A total of ten school leaders were consulted, and the findings will be referred to intermittently in the literature review. The literature review is arranged thematically, with each section highlighting important leadership orientations that are critical to success.

Emergent themes from already existing literature include those such as leadership styles, the significance of a shared mission, the culture of a learning organization to

include managing the instructional program, and development of the school learning climate. An exploration of how each of these themes affects the nature of leadership in the transition from elementary to secondary school, or vice versa. The final section of the literature review will provide a consolidated discussion of the main points, as well as highlight and discuss the emergent gaps in the literature review, and considerations on how to avoid gaps in our own exploratory research.

Furthermore, the participants that will be included in this exploration will be primarily from an urban district, eliciting an urban lens on the entire exploration, and making the exploration look at how education is different between urban and rural areas. Special focus will be paid to exploring common characteristics and common barriers to success in an urban setting.

Leadership styles, in particular, are an important theme in this exploration, and will be a main lens for looking at the results of both the PIMRS survey, and the reflection questions. In particular, transformational and servant leadership styles are the ones that came about the most often in research and anecdotal evidence from educators who have previously transitioned, so these two types of leadership are the ones that will be focused on here in depth.

### **Leadership Styles**

The two leadership styles we will focus on in this literature review are transformational leadership and servant leadership. These two leadership styles are the focus of this examination for several reasons. The first rationale for focusing on these two

frameworks is that they are highly pertinent and popular leadership styles in school leadership, based on the understanding that school leadership involves the ability to cater to the needs of multiple stakeholders as well as ensure that others without the leadership roles have the adequate support to perform their responsibilities (Spillane et al., 2003). Both of these leadership styles assert that school leaders should be able to think about not only the needs of their students and those they serve, but also keep in mind the overall mission of the organization, specifically at the school where they serve and lead. Each of these leadership types are practiced in both of the settings that we will be focusing on in this exploration, transitions from elementary to high school, and high school to elementary school. These two styles of leadership can be useful to those in transition. In the case of transformational leadership, there is the way leaders set an example for their followers, making them believe they can achieve the same successes, and with servant leadership, it is seen in the way the leaders offer support to teachers. The second rationale for focusing on transformational and servant leadership is that during preliminary diagnostic work, school leaders who had previously transitioned alluded to both of these theories – explicitly and implicitly. For example, one of the diagnostic sources noted the importance of feeling that leaders are cognizant of their own professional aspirations, such that they create conditions that are conducive to the development of their talent. This assertion resonates with transformational leadership through the implicit focus on inspirational motivation (Adarkwah & Zeyuan, 2020), while it resonates with servant leadership through the focus on “commitment to the growth of individuals” (Williams &

Hatch, 2012, p.39). The theories of both types of leadership can be applied to the transition from elementary to high school leadership, and the vice versa, which is the focus of this exploration. The third rationale of the literature review focus is that the context of transformational leadership from one school setting to another implies that the leader must not only possess innate traits that determine the possibilities of success but also have the ability to adapt to a new situational environment while meeting the mandate to serve the interests of the entire organization. Transformational leadership would therefore be relevant in a leadership transition context because it provides insight into how individuals and organizations can be successful. The focus is on not only the individual success, and the success of the students, but also the overall success of the organizations that are in charge of the schools. Similarly, servant leadership would be relevant in a leadership transition context because it underscores the importance of placing the needs of the organization and stakeholders before self. Both of these types of leadership focus on the success of the educator, the student, and the organization as a whole. These two types of leadership resonate with the exploration in that they reinforce the many themes identified in the literature itself. They promote the ideas of a shared mission, reflective practice, and creating a positive cultural environment for education, reinforcing that these leadership styles are pertinent to discuss when exploring the idea of leadership and transition in leadership.

### **Transformational Leadership**

One of the most celebrated leadership styles in research is transformational leadership. A transformational leader is defined as “a person who comprehends a realistic vision of the future that can be conveyed and shared, motivates subordinates intellectually, and addresses individual differences among subordinates” (Adarkwah & Zeyuan, 2020, p.18). This means that a leader is a person who has a vision of the future, and is able to convey it to others, inspiring them towards the same goal. The specific character traits associated with a transformational leader include the ability to make decisions beyond the rationale of self-interest, the capacity to motivate followers, the ability to exercise idealized influence, the ability to instill trust and confidence within all organizational members, and the capacity to serve the needs of the organization, within the context of broader community needs (Adarkwah & Zeyuan; Burns, 1978). A leader thinks about not only themselves, their own ideas, and their own cause, but also the overall reputation and perception of the community and organization they represent. Moreover, Dussault et al. (2008) also highlight the significance of promoting self-efficacy among the followers, or the extent to which the leader can instill a belief among followers that they are capable of performing a specific task. Part of the magic of this type of leadership is that they empower their followers, or in our case, students, to believe that they are capable of something, whether it is learning something, achieving a good grade on an assignment, or having a successful future. The character traits associated with transformational leadership are crucial in shaping the performance of followers, and by

extension, determining the efficacy of the organization (Burns, 1978). If the organization does not have successful, empowered followers, then the organization's efficacy comes directly into question.

Research suggests that the successful transition between different organizational environments is largely influenced by the degree of adherence to transformational leadership canons. On the one hand, the school leader adopting transformational leadership will portray themselves in a manner that fosters a desire for emulation among the followers (Adarkwah & Zeyuan, 2020; Burns, 1978). Having a school leader who sets a good example of what students can achieve in their own life is a facet of this type of leadership. On the other hand, a transformational leader will indirectly influence student learning and achievement outcomes by affecting teachers' perceptions of the teaching profession, their roles and responsibilities within the pedagogical environment, and their self-perceived capacity to deliver on learning objectives (Adarkwah & Zeyuan; Dussault et al., 2008). A transformational leader in education will not only empower their students, but also the colleagues around them, sharing with them an air of motivation and self-respect that they can then pass on to their students. The nature of transformational leadership is therefore consistent with instructional leadership, as it connotes a degree of collaboration between the teachers and the school leaders in shaping the objectives and learning outcomes of the student body, showing the success and efficacy of the organization as a whole.

### **Servant Leadership**

Apart from transformational leadership, a significant amount of research has also been conducted to evaluate the efficacy of servant leadership. The traits of a servant leader include “listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, commitment to the growth of people, and building community” (Williams & Hatch, 2012, p.39). The servant leader puts the welfare and success of their followers over their own welfare and success. The main avenue through which servant leadership affects organizational efficacy is through the channel of nurturing trust and consolidating relationships between the various stakeholders (Williams & Hatch; Greenleaf, 1977). Much like transformational leadership, we see the idea of creating positive relationships between the leader and their followers, but the difference here is that the leader in servant leadership will put the needs of the followers over their own, instead of emulating something that their followers can look up to. This type of leader would put their followers’ wants, needs, and successes, above their own. A servant leader is therefore one who places him or herself at the service of others in the organization and actively engages in practices that are intended to improve the morale and productivity of the group – which is especially important in navigating difficult times in the organization (Greenleaf, 1977).

The embrace of servant leadership can be useful in shaping a school leader’s instructional efficacy in the transition from primary to secondary school environments or the other way, from secondary to primary school, specifically, for a number of reasons.



First, servant leadership places the needs of the students and teachers (among other subordinates), beyond the interests of the school leader, such that it is possible to identify and work towards common organizational objectives (Williams & Hatch, 2012). By prioritizing the needs of students, it creates an environment that prospers the common objectives of the organization. Everyone in the organization knows that they can count on their colleagues and superiors to have the same common goals, and all be working toward the same outcomes. Second, it can be useful in raising the morale of the employees, which in turn is associated with a higher degree of employee retention, overall job satisfaction, and higher levels of productivity (Williams & Hatch). If the teachers are happy with their students' hard work and success, then teacher morale will be higher, creating a much more positive environment for everyone involved in the organization. Third, servant leadership fosters a relational dynamic of trust among followers, as well as between the leader and the followers, which enables all members of the organization to set ambitious targets and work collaboratively to attain the common objectives (Williams & Hatch; Greenleaf, 1977). It is common knowledge that there must be trust in every successful relationship, be it business, education, love, or another industry, and servant leadership certainly fosters this idea and can enhance morale.

The two leadership styles discussed in this section attest to the approach undertaken by many school leaders in organizational transition, which is why this exploration focuses on the two styles specifically. The similarity between transformational leadership and servant leadership pertains to the capacity of both

leadership styles to improve the motivation levels of followers, and consequently increase productivity through that motivation, achieving efficacy on both the part of the organization, and those within it. The main difference is that transformational leadership focuses on engendering self-efficacy and self-empowerment within the followers, such that the success of a transformational leader is necessarily reflected by how followers perceive themselves, their occupations, and their capabilities (Adarkwah & Zeyuan, 2020; Dussault et al., 2008). The successes of those underneath the leader reflect the overall success of the leader themselves. In contrast, the success of a servant leadership approach is predicated on the extent to which the leader can meet the needs of others in the organization, intimating that the leader is critical in ensuring the success of meeting organizational imperatives. The leader's own individual successes do not matter in servant leadership, instead the leader is vital to, and will do anything in their power, including sacrificing their own needs for, the successes of their followers and the organization as a whole. Although both approaches have merit, research aligns transformational leadership more with instructional leadership, implying that it represents the best approach that can lead to organizational success (Adarkwah & Zeyuan, 2020). This is also reiterated in Smith & Smith's evaluations (2015), when they state, "an effective leader must routinely engage in a number of important instructional leadership elements that give sustenance and life to their leadership practices in order to confidently engage in those practices" (p. 21) meaning that to be an effective leader, administrators must use many different approaches, which can include qualities of transformational

leadership. “[W]hat is needed is the careful integration of leadership theories of practice that support specific instructional leadership practices” according to Smith & Smith (2015, p. 21), which can be interpreted as meaning that the leadership skills that educators should embody should be self-sustaining and positive ones, ergo, more geared toward transformational leadership, which does not require that one give away all their resources. This makes logical sense, in that if educators practiced too much servant leadership, then they would not be able to take care of themselves, instead constantly sacrificing everything they have for the good of their followers and the organization. The main drawback of servant leadership in this case is that a leader who practices this philosophy will foster success and self-efficacy in their followers, even at their own detriment. For this reason, transformational leadership is often associated with instructional leadership, but in our preliminary exploration of leaders who have transitioned from elementary to high school or vice versa, both transformational and servant leadership were often mentioned, making us focus on both of them for the purpose of this exploration of transitional experiences. Regardless of the leadership style adopted by the school leader in question, an equally important determinant of instructional leadership efficacy is the extent to which all members within the organization have a common objective or shared mission.

### **The Significance of a Shared Mission**

A shared mission is a key concept associated with a learning organization and is an important aspect of each organization. A shared mission can be defined as “a clear and

common picture of a desired future state that members of an organization identify with themselves – essentially a mission that has been internalized by members of the organization” (Hoe, 2007, p.12), and can be in the form of a physical mission statement, or metaphorically in the form of a shared school of thought. A shared mission also attests to the existence of a commonly agreed to and expected agenda for the positioning of the organization in the future (Hoe, 2007). A shared mission asserts that there is a common goal that everyone in the organization will be striving towards. The ability to cultivate a shared vision within an organization is considered a critical determinant of its success and performance. A shared vision is useful insofar as providing the organization with a clear sense of purpose and direction – it gives followers an idea of where the founders and current leaders within the organization came from in founding the organization, and where exactly they want to take the organization in the future (Hoe, 2007). It unites every individual’s motive going forward in the organization, with a unified purpose and similar goals. This in turn is important because it creates a sustainable mindset within the organization, such that all current efforts and endeavors are necessarily related to their ability to achieve the shared mission in the future. Every individual in the organization can understand the shared mission, allowing them to work together as a team, meeting the standards set by the organization, and working towards the same goals as the rest of the organization. Furthermore, a shared mission represents a broad picture that can be used to align current performance targets and objectives with tangible and measurable success outcomes (Hoe, 2007). It allows the organization to set measurable standards that can be

met in order to achieve future goals associated with shared mission. It also gives the organization something to aim for, allowing them to measure how successful they have been thus far, and lets them measure their success in the future. Organizational performance targets would not only be rooted in meeting present needs, but also be connected to a long-term organizational objective. Finally, a shared vision can be critical in providing the organization with guidance on activities or protocols that need to be changed, versus those that need to remain in place (Hoe, 2007). Organizations can look at what has been working for them thus far, and improve areas that need improvement, while focusing on the areas where they have seen success thus far. In this context, a shared mission cannot be separated from a learning organization, as it ensures that the organization is capable of scrutinizing and ascribing value to current processes based on how those processes can achieve the common objective set out in the shared mission (Castelli, 2011).

A shared mission is paramount in determining the instructional leadership efficacy of a school leader in transition. This is because while previous successes and performance were directly connected to the environment and situational realities of one level of schooling, the school leader must necessarily adapt goals and expectations to resonate with the new school environment. A shared mission becomes the tool through which the school leader can contribute to the creation of a shared goal and even a physical mission statement for their new organization, considering the desires and objectives of both subordinates and students. By looking for the shared mission in the new environment that

the leader finds themselves in, they can focus their practice on the mission of their new school or organization, and bond with new colleagues over the shared mission. Moreover, a shared mission is instrumental in guiding the success of instructional efficacy because it aligns the leader's activities and roles within the organization with the desires and intended outcomes of all pertinent stakeholders within the institution. Through the shared mission, the entire team of leaders can synchronize their efforts towards the same goal.

Furthermore, instructional leadership can be promoted by a shared mission in terms of influencing knowledge acquisition approaches, as the organization can draw on both internal and external resources to achieve the common purpose. Again, everyone can work together towards the same desired outcome, identifying what does and does not work for them, and adapting as needed. As noted earlier, the concept of a shared mission is closely associated with the learning organization to which it belongs – one of the foundations of an organization is their goal for bettering the future, and this comes in the form of the shared mission. Another important determinant of the efficacy of instructional leadership is therefore the extent to which the school leader can cultivate the culture and shared mission of the learning organization within the new school environment.

### **The Culture of a Learning Organization**

The criteria for a learning organization extend beyond solely the nature of training and educational opportunities that are available to the members of an organization (Heorhiardi et al., 2014). Rather, Heorhiardi et al. (2014) characterize a learning organization as predicated on “creating a climate that rewards openness about ideas, with

a bent for examining data and assumptions; and helping people become more self-reflective” (p. 9). A learning organization achieves the status of an official learning organization through the facilitation of transformative, rather than informative, learning within its members. The difference between the two is that informative learning is based on promoting the acquisition of knowledge that resonates with the leadership beliefs of the individual, while transformative learning is based on encouraging the acquisition of knowledge in a manner that challenges or changes the prevalent mental models (Heorhiardi et al.). Transformative learning advocates for promoting change and improvement in the general society as well as personally as informative learning does just that, informs.

Fiol and Lyles (1985) offered a different conceptualization of organizational leadership, arguing that there is a conceptual difference between organizational adaptation and organizational learning, such that change is not necessarily contingent on learning. This, therefore, challenges the assertions by Heorhiardi et al. in relation to the primacy of transformative learning in orchestrating effective change within the organizational environment. The resolution of this conflict is that the organizational environment can be changed through transformative learning, which resonates with Fiol and Lyles’ (1985) conceptualization of organizational learning. However, organizational adaptation extends beyond transformative learning, to capture how the organization responds to external and internal environmental factors that may signal the need for change.

In evaluating the central tenets of organizational learning, Fiol and Lyles (1985) contended that there are three main areas of consensus in the literature. First, environmental alignment is critical in maintaining the competitiveness and relevance of an organization within its sectoral context. Environmental alignment is the extent to which the organization can cultivate and realize the potential to learn, relearn and unlearn its past activities and behaviors (Fiol & Lyles, 1985). The implication is that “organizational adaptation is the essence of strategic management because it is the key activity for dealing with changes occurring in the environment and involves the continuous process of making strategic choices” (Fiol & Lyles, 1985, p.804). Organizational adaptation is dependent on environmental alignment, and environmental alignment is dependent on the organizational adapting – constantly changing and re-assessing what is best for the organization’s climate.

The second area of consensus about the constituents of organizational learning is the inherent difference between organizational and individual learning. Organizational learning is not perceived as the cumulative result of each individual’s learning within the organization. Instead, it is oriented towards systemic level changes, such that while it is partially influenced by the nature and results of individual learning within the organization, it serves to preserve “certain behaviors, mental maps, norms and values over time” (Hedberg, 1981 as cited in Fiol & Lyles, 1985, p. 804). In this case, organizational learning can be described as similar to having a shared mission; although



the organization is constantly changing based on the environment, remaining focused and committed to the organization's goals.

The final area of consensus is in relation to contextual factors. The four contextual factors that determine organizational learning are a corporate culture that deliberately promotes learning, a strategic orientation that values flexibility and adaptation, an organizational structure that is conducive to new insights and innovation, as well as the operational environment (Fiol & Lyles, 1985). The corporate culture can promote learning through the shared values, behavioral expectations, and ideological norms that permeate the entire organization (Heorhiardi et al., 2014; Fiol & Lyles, 1985). A flexible and adaptable strategic orientation ensures that the organization can create boundaries to decision-making processes, such that every decision made within the organization remains consistent with the goals, objectives, and mission of the organization.

Organizational structure is equally important in shaping the processes of learning. For instance, a bureaucratic organizational structure will likely impede the learning of the organization and its members, as individuals remain constrained by their occupational positions within the company hierarchy. A learning-promoting culture fosters an element of fluidity within the organization, such that members from different departments, and employees with different ranks across the organization, can effectively learn from others and contribute to the learning of others (Fiol & Lyles, 1985). The significance of the internal and external environment to the learning of organizational members is based on

its relative complexity, such that a more complex and dynamic environmental reality will inhibit organizational learning.

Heorhiardi et al. (2014) instead posited that organizational learning is best facilitated through four approaches. The first is the mandate to “foster a culture that supports transformative learning on the individual level and double-loop learning on the collective level” (p.9). This has a high degree of resonance with the assertions by Fiol and Lyles (1985) that the purpose of organizational culture is to facilitate learning in the organization, with Heorhiardi et al. adding the specification of transformative rather than informative learning. The second strategy to achieve a learning organization is the development and promotion of leaders that support the culture and transformation process (Heorhiardi et al., 2014). The third strategy is the promotion of a culture in which leaders are amenable to being challenged by others, as consistent with the principle of reflective leadership practice within the organization (Castelli, 2011). The final strategy is the encouragement of employees within the organization to actively engage in critical reflective practice and to apply the double-loop learning framework (Heorhiardi et al., 2014).

Regardless of its different iterations in the current literature, organizational learning can be viewed as an important determinant of a school leader’s instructional leadership efficacy in the transition from elementary to secondary school, or vice versa, for a plethora of reasons. First, organizational learning is necessarily rooted within the past and current context of the organization, such that all decision-making processes are

based on the consideration of pertinent variables. Second, organizational learning necessitates a culture of learning within the organization, implying that the school leader in question should be amenable to learning new realities in the new occupational context. By extension, the school leader in question is best served by engaging in reflective practice, allowing the other organizational members the same, and being open to criticism without overreacting (Heorhiardi et al., 2014). Third, organizational learning stresses the importance of transformative learning, which must challenge the current practices used by the employees in the organization, or at least encourage thought processes that are not essentially compatible with defining the school's mission. Finally, this can also help district leaders in that after transitioning themselves and having self-awareness as well as personal experience with the transition, they can cascade their learning, reflections, and experiences in an effort to assist others in their transitions.

### **Reflective Practice**

Reflective practice is the ability to critically self-evaluate past decisions, behaviors, and perceived norms, to achieve personal and professional development, and is extremely vital to any administrative educator transitioning in either direction. Reflective practice cannot be achieved when an individual perceives his or her mental models as static and objective frameworks for evaluating reality (Castelli, 2011). Instead, reflective practice essentially acknowledges the inherent limitations and biases that can affect behavior and action, intimating that an individual who exercises reflective practice is cognizant of the possibility of inherent flaws within the worldview. By having a self-

reflective practice, one can assess the positives and negatives of their own practice, while also keeping in mind the mission of their organization and the needs of their subordinates, while assessing their practice. Steiner (1998) also argues that organizational learning can be impeded in contexts where routine reflection adopted by teachers has significant differences from the reflections that are promoted by the administration or organizational leadership. Steiner (1998), therefore, argues that organizational learning is best promoted in instances where reflection used across the entire organization is consistent. This would seem contradictory to the contributions by Castelli (2011), who argues in support of adopting fluid conceptualizations of reflections such that organizational learning is facilitated by the fluid interaction between all organizational members – regardless of inherent conflicts. The contradiction can be reconciled by considering that Steiner’s main argument can be consistent with Castelli’s approach in that fluid reflective practice as argued by Castelli can be promoted by aligning them across the organization, as suggested by Steiner. If the organization adopts a self-reflective practice that extends across the organization, then everyone can work together towards its common goals.

Moreover, reflective practice can be critical to the success of a school leader’s instructional leadership style. Reflective practice enables both the school leader and the teachers to learn from their mistakes, as well as embrace the possibility of acquiring more information from others within the school – including the student body. Reflective practice allows the educator to be a sponge, absorbing everything in the environment

around them, assessing what works and what needs to change, and adapting to the same values and practices that are promoted in the organization's shared mission. Reflective practice also changes the relational dynamics within the organization, implying that the promotion of reflective practice within the student body is equally critical in ensuring that instructional leadership achieves its primary objective of attaining certain learning and achievement outcomes among the students.

### **The Nature of Leadership in Elementary and Secondary School Environments**

Instructional leadership in elementary schools is based on a process of social construction, through which different forms of capital are used to cultivate instructional leadership (Spillane et al., 2003). Specifically, teachers within the elementary school environment can construct others as leaders, based on shared values along the lines of economic, human, cultural, and social capital (Spillane et al., 2003). Moreover, instructional leadership in elementary school settings is informed by the nature of interactions between teachers and the leaders, as well as the leader's own position within the organization. The overall implication is that to implement instructional leadership in elementary school settings, school leaders need to understand the role of the different forms of capital (that is, economic, social, human, and cultural) in constructing leadership, as this is critical in determining the efficacy of leadership within that environment (Spillane et al., 2003).

As noted by Spillane et al. (2003), instructional leadership in elementary school environments expands beyond the roles and responsibilities of the school leader,

including the teachers. This assertion is also corroborated by Bond (2021), according to whom teachers in elementary schools often feel the need to increase their decision-making capacity, while not necessarily entering into an administrative position, which then underscores the importance of instructional leadership. The research by Bond (2021) notes that in elementary schools, instructional leadership can also be achieved by providing teachers with the opportunity to continue instructing their students, while simultaneously providing different forms of support outside the classroom. For instance, teachers can demonstrate instructional leadership by tailoring specific learning material for children with learning disabilities (Bond, 2021).

Notwithstanding the reality that teachers can participate in instructional leadership in elementary school settings, school leaders also have an important role. According to Garcia et al. (2014), the leadership efficacy of an elementary school leader can be inferred from their relative strengths and weaknesses on the ‘Big 5’ personality trait scale. Specifically, the researchers note that “Open, Agreeable, and Emotionally Stable principals were perceived to be Transformational Leaders,” while “Open and Emotionally Stable school leaders were also perceived as Transactional Leaders,” and “when school leaders were rated as Conscientious and Emotionally Unstable, they were perceived as Passive-Avoidant Leaders” (Garcia et al., 2014, p.204). As the emphasis in this study is on the overall effectiveness of school leaders that have transitioned from one setting to another, it will be interesting to note whether school leaders applying transformational leadership have the personality traits identified by Garcia et al. (2014).

In the secondary school environment, leadership tends to be based on a model of distributional leadership, wherein teachers and other staff can participate in decision-making processes (Hulpia et al., 2009). Despite the importance of distributional leadership in the secondary school environments, Hulpia et al. (2009) noted that a strict leadership hierarchy is not necessarily related to organizational commitment on the part of followers, intimating that a more rigid structure is deemed more appropriate in secondary school environments.

In evaluating instructional leadership in secondary school environments, Huong (2020) noted that leadership efficacy is based on both external and internal factors. Concerning external factors, the most important variables are “the degree of autonomy of the school for instructional activities; awareness of the managers and teachers about leading teaching activities; and education innovation”, while the important internal variables include “a system of guiding documents of management levels on teaching activities; conditions of facilities and finance for school teaching activities; and principal’s training level” (p.48). In the context of this study, it will be important to note the extent to which the identified variables determine the efficacy of instructional leadership within both elementary and secondary school environments.

### **Common Characteristics & Common Barriers in Urban Settings**

The focus of this exploration will be primarily dealing with educators from an urban setting, and for this reason, urban education will be focused on in the literature review in order to connect it back to the different themes that emerged during primary

research. Academic activist Pedro Noguera asserts that there are many barriers that are present in urban settings, primarily for students of color, and he talks about equity rather than equality – the idea that not every individual has the exact same needs, and therefore every individual will have different specific needs to be attended to (2009). When he was interviewed by Emily Kaplan in 2020, he reasserted this idea by explaining that other countries have different approaches to improving education, and they are finding much success, so why can't these same practices also be applied in the USA? Noguera asserts in this interview that other countries “use trust and guidance, rather than threats, and that makes a huge difference” (Kaplan, 2020). By specifically examining an urban setting and making sure to collect experiences from many different ethnicities of principals and leaders in schools, it will be interesting to see if this theme comes up in the Reflection Questions section of the exploration. Thinking about the use of trust and guidance, rather than threats can be connected back with the themes of having a shared mission, cultivating a positive environment, and self-reflective practice. Noguera (2009) also asserts that if organizations do not provide equity in the form of resources that individual students need, then students will continue to suffer, using his own son as an example, explaining that when his son reached the tenth grade, his friends started to drop out due to lack of support at home or at school, and his son began to suffer as well, feeling like there was no upward trajectory for him as a black individual (Noguera, 2009). This is not directly asked about in the reflection questions, but it will be interesting to see if any themes of inequality are evident for any of the participants in their experience.



In his work, Noguera explains often how race and a number of other factors can interfere with the goals of providing a shared mission, cultivating a positive educational environment, and self-reflective practice. One of the ways he describes improvement in education for everyone is when he asserts that “Assessment is an essential part of education, because you have to know what kids are learning. So, you have to assess their growth, their progress. But assessments should be used for that purpose and to diagnose learning needs, not to rank people, which is what we are doing now” (Kaplan, 2020). He asserts that things need to change in terms of our shared mission, cultivation of a positive environment, and self-reflective practice. In order to really give equal footing to students, he asserts that each student will have different needs and need different supports, thus asserting that these themes of education need to be reevaluated to be more inclusive to all learners (Noguera, 2009). It will be interesting to examine how exactly Noguera’s assertions and beliefs interact with the results of the PIMRS survey and reflection questions, being that our participants are all going to be located in predominately urban settings. Looking at the answers to the Reflection Questions section, this lens will be applied, looking at how the leaders in these urban settings use equity to their advantage to give students a better chance and more support.

### **Discussion and Gaps**

The main avenues through which school leaders in transition can maintain instructional leadership effectiveness are through their leadership style, the promotion of a learning organization, defining the school mission across the organization, managing

the instructional program, developing the school's learning climate, and reflective learning. The identified elements are interrelated and co-dependent in achieving leadership efficacy, as they combine the personal leadership traits and characteristics of the leader, the mandate to align decision-making protocols with the organization's internal and external environment, and the embrace of continuous learning as a pivotal element of guiding practice within the organization. These avenues constitute what it takes to transition from one environment to another, and although there is a lot of literature available, there are a few gaps in the research.

The first gap in the literature pertains to the impact of experiential knowledge in shaping the success of the leader in transition. In other words, understanding how the experiences of leading an elementary school versus the realities of leadership in a secondary environment assume a degree of continuity rather than change. It will therefore be critical to consider any qualitative research approaches that can include school leaders who have transitioned from elementary to secondary school environments or vice versa from secondary to elementary school environment settings, to gauge the relevance and contribution of experiential value.

The second gap in the literature pertains to the extent of consistency between instructional leadership (which resonates with the 'what' of leadership) on the one hand, and the leadership styles that are typically used in organizational settings on the other (which resonate with the 'how' of leadership). Although the present study attempts to redress this gap by considering similarities and differences between instructional

leadership, transformational leadership, and servant leadership, there is a lack of literature that considers the conceptual differences in practice. This would be important in highlighting the challenges and potential barriers that school leaders in transition can face between the elementary and secondary learning environments. A way to address this gap in our own exploration is to look into the similarities and differences between different types of leadership.

In summary, the purpose of the literature review was to highlight the range of practices that are used to achieve organizational effectiveness. The main research topic is to understand how school leaders transitioning from one learning environment to another can ensure the success of instructional leadership. Instructional leadership was in turn defined as the collaboration between the school leader and the teachers in creating a learning environment that is conducive to meeting the learning and achievement outcomes of the student body.

The first identified avenue to ensure the success of instructional leadership for a school leader in transition is the nature of the leadership style adopted. While servant leadership has its merits, the critical literature review noted that transformational leadership may be more appropriate as it has a higher degree of resonance with instructional leadership. The second avenue is shared mission, which alludes to common goals and objectives across the entire organization. A shared mission can augment instructional leadership by creating commonly accepted operational objectives, thereby aligning current practices with long-term operational objectives. The third avenue is the

promotion of organizational learning and managing the instructional program through which the entire organization can benefit from learning from its mistakes, adapting to situational realities, and creating a culture that is conducive to learning and innovation. The final avenue is developing the school learning climate and reflective learning. Each one of these tenets can be achieved through reflective practice, as the school leader and teachers can actively engage in constantly challenging their world views to expand their epistemological base.

Overall, the literature review suggests that instructional leadership efficacy can be maintained in the transition from one school setting to another, provided the school leader adopts a positive leadership style, participates in the generation of a shared mission, fosters a culture of organizational learning, promotes reflective practice, and manages the instructional program.

## METHODOLOGY

The purpose of this mixed-methods study was to examine the determinants of instructional leadership for school leaders in transition from one school setting and environment to another, specifically in this case, transitioning from elementary to secondary school leadership positions or the vice versa of transitioning from high school to elementary school. This examination and exploration sought to note the extent to which instructional leadership methods used in the transition of elementary to secondary school (or vice versa) environments were similar or different, thereafter accounting for what determined the efficacy of instructional leadership in each respective setting. This exploration focused on the transition from elementary leadership positions to high school leadership positions, or the opposite, in the past five years through collecting qualitative and quantitative data from individuals in these positions. The focus was aimed toward those who have already transitioned and have been in their new position for at least a year, if possible, in order to gain an insight into their transition. With reflective practice, this allowed the individuals to give insightful responses.

The study was framed diagnostically through informal conversations and started formally with a screening questionnaire. The study then collected qualitative data through an initial screening survey, followed by the analysis of quantitative data using the Principal Instructional Management Rating Scale (PIMRS) by Hallinger & Murphy (1985) (Appendix D) with the author's permission. The PIMRS was selected because it investigated a school leader's instructional effectiveness based on three themes identified

in the literature review: defining the school mission, managing the instructional program, and developing the school learning climate. These were relevant to this exploration, as they also aligned with the tenets of the efficacy of instructional leadership. The study concluded with written participant reflections. These surveys, the PIMRS scale, and the reflection allowed the researcher to analyze the experiences of those who have transitioned from a position of leadership in either setting and concluded what is similar or different between the two school settings.

This chapter presented the methodology or intervention that was used. The first section detailed the participant recruitment process, followed by a detailed explanation of what the proposed intervention entailed. The final section concluded with a consideration of some of the methodological limitations, as well as how the identified limitations were addressed in the study of elementary and high school leadership.

It should be noted that this exploration was done with no intention of any bias, despite any personal experiences of the researcher. The motivation behind this researcher wanting to explore this topic was that their experience transitioning in the school system made them want to further explore how to improve the experience for others going forward. As a Principal in an urban setting who has transitioned personally, the researcher's motive was one of service unto others. The ultimate motivation behind this exploration was to improve the transition process for others in the future, and make the transition more seamless, and ultimately just easier for those who move in either direction. Surveys were conducted with no bias or influence on the part of the researcher,

and responses and data were interpreted with no personal bias or influence. Results included in this exploration were factual and quoted directly from participants.

### **Participant Recruitment Process**

Considering the specific focus of this study, the participant sample was comprised of school leaders who have experience in both the elementary and secondary school environments, specifically those who have transitioned from positions of leadership in an elementary setting to leadership positions in a high school setting or the other way, going from high school leadership to elementary leadership. The participants included school leaders transitioning from elementary to high school, or vice versa, from elementary to high school. They were currently transitioning or have transitioned within the last 5 years. The aim was to select participants that have finished their transition, hoping that they have spent a year in their new position so as to have had time to reflect on their experience, and explain how it could have been better or different. This was not a requirement, as it could have been complicated to find individuals to participate. A total of 10 participants were recruited, and 15 were contacted to find 10 willing and eligible candidates. A solicitation email (Appendix A) was sent to potential participants within a single urban area in the Midwestern, USA, and was focused on school leaders, specifically principals, and assistant principals. The email detailed the nature and purpose of the study and asked interested participants to demonstrate their eligibility to participate by confirming that they have transitioned from an elementary school to a high school or a

high school to an elementary school, as well as where they were, and where they are now, as an administrator.

The second stage of the recruitment process was to screen the potential participants (Appendix B). The method used was purposive sampling, defined as an approach where the researcher has the prerogative to select participants based on their ability to meet specific criteria relevant to the research (Campbell et al., 2020; Barratt et al., 2015). Since all potential participants were school leaders that have transitioned, purposive sampling was used to ensure that the sample could be generalized to the population. Therefore, the 10 participants selected had varying demographic characteristics in terms of age, gender, race or ethnic identity, professional experience, and leadership style. Ideally, the final sample was comprised of at least five males and five females of different ethnic identities (Caucasian, Black, Hispanic, Asian), different ages, and different years of professional experience.

After the purposive sampling technique was applied to narrow down the participants, an informed consent form was emailed to the selected individuals. The purpose of the informed consent was to provide the participants with information about the study, their rights during the research process, and the boundaries that would apply to the researcher (Xu et al., 2020; Rodriguez-Patarroyo et al., 2021). The informed consent form (Appendix C) detailed that the participants had the right to withdraw from the study at any time with no sanction towards them; and that they had the right to confidentiality. In addition, the informed consent detailed how the researcher would secure the



confidentiality and privacy of the participants, for instance by storing all sensitive information in a password-protected and secure location, as well as using pseudonyms in the presentation of results in the final research document. There was complete confidentiality, and pseudonyms were used when discussing findings to maintain the anonymity of subjects. The informed consent also provided the contact details of the researcher and encouraged the participants to ask any questions or express any concerns they may have had.

### **Intervention**

The focus of the study was on examining school leaders in transition from one school setting to another, specifically those who have transitioned, or are transitioning, from elementary to high school or high school to elementary. The literature review highlighted important themes that ostensibly affect both the transition experience, as well as the efficacy of instructional leadership in both contexts. The themes in question were leadership style, shared mission, the culture of a learning organization, reflective practice, and managing the instructional program. Specifically, each participant was asked to reflect on their leadership style and instructional effectiveness through a written reflection. The reflection consisted of questions about the school leader's experience during their transition from elementary to high school leadership or vice versa (Appendix E). The questions encouraged the school leader to consider the themes (school mission, managing the instructional program, developing the school learning climate, and leadership style). The reflection was a written one, with questions to prompt the educator

about their experience. The rationale for asking school leaders to identify their own approaches (including leadership styles) and explain their experience, was because the literature highlighted this as being integral to implementing instructional leadership.

The data collection for the intervention entailed a qualitative screening survey that was administered to school leaders transitioning from one school environment to another. The survey was administered first, to identify some definitional aspects of instructional leadership in the elementary and secondary schools. This initial survey was intended to probe into the lived experiences of the research participants concerning the transition from one setting to another, going from elementary to high school or vice versa. Secondly, a written reflection regarding the leader's leadership style and instructional effectiveness was collected to determine the leader's experience during the transition. The reflection consisted of the school leader's experience during their transition from leadership in elementary to high school or high school to elementary school, comparing the two directly. Lastly, the Principal Instructional Management Rating Scale (PIMRS) was administered to each participant to correlate themes and actions related to the leader's instructional practice and effectiveness.

The Principal Instructional Management Rating Scale (PIMRS) was administered to each participant (Appendix D). The use of this scale was used to help connect directly to determining the instructional effectiveness of school leaders that have made a transition. The dimensions noted in the scale connected with the themes mentioned throughout the literature review. PIMRS is a framework that highlights the various

dimensions of instructional leadership (Hallinger & Murphy, 1985). The framework is divided into three different dimensions. The dimensions include defining the school mission, managing the instructional program, and developing a positive learning climate. The dimensions are broken into 10 instructional leadership functions. Using this instrument allowed the researcher to verify the experiences of those in leadership positions as well as connect overall themes, using a reliable and universal scale to reinforce and connect the ideas brought up in the initial survey and reflection. The researcher secured permission to use the PIMRS scale from the author in order to reinforce the conclusions drawn through preliminary surveys and reflections. This scale was used to triangulate data, themes, and connections identified in the participant surveys and reflections.

The researcher explored how the school leaders' results from the PIMRS contributed to their overall instructional effectiveness. This exploration also considered any professional development the school leader experienced and how it supported or shaped their effectiveness and leadership style through the reflection questions. At the end of the study, the researcher dissected and analyzed the gathered information to draw conclusions about the transition between elementary and high school leadership positions, or high school to elementary school leadership positions.

One of the main limitations of qualitative data is that it is subject to various forms of bias that can jeopardize the integrity and accuracy of the collected information (Maxwell, 2014). To correct this potential limitation, school leaders were given the

Principal Instructional Management Rating Scale (PIMRS). The survey and reflection questions were able to ascertain the educators' perspectives on the efficacy of the instructional leadership approaches adopted by the respective school leaders.

### **Rationale for Intervention**

The first rationale for the proposed intervention was to demonstrate whether school leaders in transition found themselves to be more or less effective instructionally as a result of transitioning from one setting to another, or whether other factors influenced their instructional leadership. This was also important in determining the leaders' overall instructional effectiveness after they transition from elementary to high school leadership, or vice versa, going from high school to elementary school leaderships. The second rationale for the intervention was to highlight themes experienced by transitioning principals and assistant principals, as collected from the reflections and the PIMRS, thereby providing some practical utility. The intervention was also able to ascertain whether the transformational leadership style or servant-oriented style was associated with a higher degree of instructional leadership efficacy. Moreover, the participants' reflections provided valuable insight into the relative contribution of the themes in affecting instructional leadership efficacy.

### **Timeline**

The timeline of methodology was: in July and August of 2022, participants were identified as a part of the participant recruitment process using purposive sampling in the form of the Screening Tool/Questions. Once participants were identified, Informed

Consent forms were administered in August 2022. Following this, identified participants (the school administrators) were emailed the link to an electronic version of the PIMRS scale in August/September of 2022. PIMRS results were then be analyzed, and themes that connected to the dimensions mentioned in the PIMRS and literature review were looked for. A written reflection was administered to all identified participants of the study in September 2022. The reflection includes the participants' accounts of their lived experiences after a transition from one setting to the other, either way. The reflection also allowed the participants to share their reactions to the PIMRS, their experience during the transition, and what instructional needs or supports they needed, had, or wished they had available to them in their transition from elementary to high school or high school to elementary leadership positions. After the reflections were collected and all information gathered, the researcher coded qualitative data, analyzed the quantitative PIMRS results, and triangulated the two considering the relevant literature. The researcher then identified recommendations, next steps, and conclusions.

### **Potential Limitations**

The first potential limitation of the methodology pertained to the reality that the intervention required multiple measures for determining the instructional effectiveness. This limitation was mitigated by using the validated PIMRS instrument, which has been widely used in a range of research contexts. The second potential limitation of the methodology was that the responses of the participants in the survey and reflections may have been biased, such that the results collected may have been inaccurate. This potential

limitation was redressed by checking the accuracy of the participants' reports against the quantitative PIMRS measurement for instructional leadership efficacy. This was also useful when examining the extent to which instructional leadership was associated with bridging the gap between the empirical research in this proposed study, against existing anecdotal information on the significance of instructional leadership.

## DATA, FINDINGS & THEMES

### **Data Findings & Themes**

In this section, data, findings, and the themes between them will be explored in detail from screening surveys, PIMRS scales, and reflection questions that have been administered to the participants. From there, an in-depth analysis will be done in regards to instructional leadership in detail from each participant's experience in transition, exploring the ideas of servant and transformative leadership and their efficacy in instructional leadership, considering positives and negatives of their experience of transition, and then finally-discussing the conclusions drawn from this research. Following this data analysis the conclusions chapter will present recommendations for next steps for the future to make transitions from elementary to high school leadership, or the vice versa, from high school to elementary school leadership a smoother experience for all involved. The qualitative data was coded deductively by themes in the research literature, based on common keywords found in each participant's responses. Keywords include "shared mission," which relates to other keywords such as "collaboration," "framing," and "objectives." Keywords also include the words "leadership style," which relate to other keywords such as "firm-handed," and words relating to teaching and leadership style. The words "organizational learning" are also included in the coding, which relates to "professional development," "workshops," and "skills," and finally "climate" and "reflection," are included in the coded keywords, which relate back to other keywords such as "incentives," "rewards," "visibility," and "positive energy." All



of these keywords and themes are visible in both the PIMRS results and the Reflection Questions.

### **PIMRS and Reflection Question Results & Themes Identified**

The responses to the PIMRS survey allowed insight into the general efficacy of leadership at the elementary and high school level, and the reflection questions were very interesting to look at and think about, allowing reflection into the efficacy of leadership in transition, and also allowing exploration into the different experiences of different leaders. All results provided honest and insightful explorations into individuals in leadership transitioning from elementary to high school or the vice versa. After receiving the results of the reflections and comparing them to the PIMRS results, there were several themes that were identified in the responses, and these are easily related back to the literature explored previously. These themes include having a shared mission, leadership style, managing the instructional program, maintaining a positive learning climate, and support. First, a look will be taken at each theme in terms to the responses received in both the PIMRS survey and Reflection Questions survey, where data will be assessed and examined as it pertains to each theme that is the focus of this exploration. Furthermore, a look will be taken at how the data collected shows the different experiences of those who have transitioned, particularly how the different subgroups of participants found the experience, and how it differed between participants.

### Shared Mission

Fig. 1 – PIMRS Data Table: Framing School Goals - Demographics

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Framing School Goals (Overall)</b>	4.42	4.43	4.40	4.33	5.00	4.50	4.00	4.25	4.69	4.38
1. Annual Goals	4.31	4.33	4.29	4.16	5.00	4.00	4.00	4.00	4.50	4.50
2. Staff Responsibilities	4.55	4.67	4.43	4.33	5.00	5.00	4.00	4.25	4.75	4.50
3. Needs Assessment/Staff Input	4.14	4.00	4.29	4.00	5.00	4.00	4.00	4.00	4.50	4.00
4. Use student data	4.38	4.33	4.43	4.33	5.00	4.00	4.00	4.25	4.50	4.50
5. Easily understood	4.69	4.67	4.71	4.67	5.00	5.00	4.00	4.50	5.00	4.50

Fig. 2 – PIMRS Data Table: Framing School Goals – Leadership Setting

Leadership Setting:	ES-->HS n=7	HS-->ES n=3	Voluntary n=8	Request n=2	Same Dist n=7	Diff Dist n=3	Dist 1 n=4	Dist 2 n=1	Dist3 n=2	Dist 4 n=2	Dist 5 n=1
<b>Framing School Goals (Overall)</b>	4.36	4.58	4.57	4.00	4.36	4.67	4.25	4.00	4.88	4.38	5.00
1. Annual Goals	4.20	4.33	4.25	4.50	4.14	4.67	4.25	4.00	4.50	4.00	5.00
2. Staff Responsibilities	4.43	4.67	4.50	4.50	4.43	4.67	4.25	4.00	4.50	4.50	5.00
3. Needs Assessment/Staff Input	4.14	4.33	4.38	3.50	4.00	4.67	3.75	4.00	5.00	4.00	5.00
4. Use student data	4.29	4.67	4.62	3.50	4.43	4.67	4.00	4.00	5.00	4.50	5.00
5. Easily understood	4.71	4.33	4.75	4.50	4.71	4.67	4.75	4.00	5.00	4.50	5.00

The Reflection Questions begin with some background questions, pertaining to the last few years and the environment of the participants' transition. The participants have all transitioned in the last 5 years or less, and the majority of them transitioned voluntarily. Among the participants, 60% transitioned from elementary to high school, and the remaining 40% transitioned from high school to elementary school leadership. The first main theme that comes about in both the PIMRS and Reflection Questions survey is the idea of having a shared mission. As previously explained, having a shared mission is an important part of having a successful and productive leadership experience, and the results of both surveys reiterate this fact, showing through explanations that each individual valued having a shared mission that allowed them to build the foundations for success in their new position.

Looking at the data from the PIMRS survey pertaining to framing the school goals, there is a noted difference between the age group of 31 to 40-year-olds (Xennials) compared to other age groups in almost every question and other millennials. Also known as younger millennials, this age group's average answer was lower than the older age groups, which prompts many different insights and questions about how transition differs based on the individual's age. The younger millennials, 31 to 40-year-olds', responses and interactions were different. Participants in that age group responded somewhat faster and were eager to share their experiences. As posited by McPhee and Zaug (2000), millennials engage and process differently within an organization. Moreover, this age group assesses how they will likely fit both functionally and socially in most settings.

This also prompts insight into the experience of this age group in transition compared to the older age groups (Baby Busters, Gen X, Generation Jones- older millennials).

According to this data, framing school goals is less of a focus to the younger participants, as the answers show lower ratings in response to the questions asked in this section of the PIMRS, compared to the same questions asked of 41-50 year-old (Baby Busters/Gen X) and 51-60 year-old (Younger Baby Boomers/Baby Busters/Generation Jones) age groups.

This is not the only place in the data where we see this trend, as can be seen below.

Fig. 3 – PIMRS Data Table: Communicating School Goals - Demographics

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Communicating School Goals (Overall)</b>	4.42	4.40	4.43	4.40	4.60	4.60	4.00	4.00	4.40	4.50
6. Communicate mission	4.31	4.00	3.86	4.00	4.00	4.00	3.00	4.00	3.75	4.00
7. Discuss goals at faculty meetings	4.55	4.00	4.43	4.33	4.50	4.00	4.00	4.25	4.25	4.50
8. Refer to goals in curricular decisions	4.14	4.33	4.43	4.33	4.50	5.00	4.00	4.25	4.50	4.50
9. Goals in visible displays	4.38	5.00	4.86	4.83	5.00	5.00	5.00	5.00	4.75	5.00
10. Goals used in student forums	4.69	4.67	4.57	4.50	5.00	5.00	4.00	4.50	4.75	4.50

Fig. 4 – PIMRS Data Table: Communicating School Goals – Leadership Setting

Leadership Setting:	ES-->HS n=7	HS-->ES n=3	Voluntary n=8	Request n=2	Same Dist n=7	Diff Dist n=3	Dist 1 n=4	Dist 2 n=1	Dist3 n=2	Dist 4 n=2	Dist 5 n=1
<b>Communicating School Goals (Overall)</b>	4.40	4.47	4.52	4.00	4.43	4.40	4.30	4.00	4.80	4.38	4.40
6.Communicate mission	4.00	3.67	4.00	3.50	4.00	3.67	4.00	3.00	4.00	4.00	4.00
7.Discuss goals at faculty meetings	4.29	4.33	4.38	4.00	4.29	4.33	4.25	4.00	4.50	4.50	4.00
8.Refer to goals in curricular decisions	4.29	4.67	4.50	3.00	4.43	4.33	4.25	4.00	5.00	4.00	4.00
9.Goals visible in displays	4.86	5.00	5.00	4.50	4.86	5.00	4.75	5.00	5.00	4.50	5.00
10.Goals used in student forums	4.57	4.67	4.75	4.00	4.57	4.67	4.25	4.00	5.00	4.50	5.00

Here, looking at the data, it can be seen that the age group of 31-40 year old participants scored answers related to communicating school goals lower on average than the older age groups. This again reiterates that this data shows, for this particular study, how younger leaders in transition value a shared mission less than the older participants. This idea does not reflect as significantly in the Reflection Questions, where each individual stresses how they find the idea of a shared mission important to their own success in transition.

Looking generally at the questions related to the school mission, particularly the ones related to framing and communicating school goals in the PIMRS, the average responses of the group are high, which is reaffirmed in the Reflection Questions survey, where participants acknowledge how important it is to have a shared school mission to keep in mind and work towards, as a team, with their entire school during, and after a transition. This data shows us that having a shared mission is one of the fundamental parts of having a positive experience in transition. This section of the survey reinforces the principles of transformative leadership over servant leadership, in that it inspires change among the students and faculty, making connections, and building a strong foundation for future learning, rather than promoting sacrifice, and giving selflessly to inspire learners. The school leaders collaborate with faculty to build the school's mission and set goals for the students, with the idea of the students' futures in mind, helping them to learn the fundamentals that are needed to be successful and productive members of society. This builds a strong foundation for students in preparation for future learning.

Having a shared mission includes setting goals, communicating goals to both faculty and students, setting attainable objectives, and rewarding faculty and students for meeting and exceeding expectations. Most of the participants scored setting goals and communicating them relatively high, and also explained this in their responses to their reflection questions. Participants commonly remarked that they enjoy setting goals and meeting/exceeding them with their faculty and students, and communicating essential goals, that contribute to successful leadership. This also relates back to the idea of having

a shared mission, and how it is vital to those entering a new environment, whether it is from high school to elementary leadership, or elementary to high school leadership. The idea of being a team and having the entire faculty working together towards a common goal is one that was reiterated consistently throughout this section. Participants who were able to find support and a shared mission in their new environment boasted of more positive experiences than those who did not have much support or teamwork.

In terms of comparing the experience of the participants, the idea of a shared mission is evident in all of the participants' experiences, as shown by the high overall average of 4.42/5.00 on the PIMRS scale from participants (Fig. 1). Here, there is an obvious contrast between the different demographics of the participants. In regard to the Caucasian participants, there is a lower average score in this section (4.33), compared to the responses of Black participants (5). Furthermore, it can be seen that other participants of color also highly value the idea of the shared mission, in that Asian participants and Hispanic participants rated the importance of having a shared mission as a 4.00 and 4.50 out of 5.00, respectively. It is interesting to compare this data and ascertain that those who are seen as a minority highly value their shared mission as a foundation to their efficacy as a leader.



### **Leadership Styles**

Figures 1 and 2 show the data collected about the importance of a shared mission in terms of demographic and leadership setting, and this brings about some interesting insights into the types of leadership that participants found most efficient in their experience. The two types of leadership that were explored in depth were servant leadership and transformational leadership. Servant leadership involves giving everything for the success of your subordinates, including sometimes giving away all of your personal resources. This type of leadership style was not the most popular in this exploration, with participants' ideals lining up more with transformational leadership, wherein the leader sets an example for their subordinates to follow and show students what they can achieve if they continue to work hard, just like their leader does. Transformational leadership would take previous assessments into account to create attainable goals for the year, and servant leadership would include sacrifices on the part of the leaders and faculty to give their students a positive experience and prosper growth.

When asked the question about describing leadership style in the reflection, there were quite a few interesting answers, and the common theme among them was being authoritative, maintaining a level of respect, but also being open and communicative with students and faculty. For example, participant "Hannah" described her leadership style as "firm-handed" in her reflection survey:

I think I would describe my leadership style as a firm handed approach. I expect a lot from my students, because I want them to be successful adults in our society. I

try to teach my students that hard work is at the center of success, and I try to instill in them the values necessary to be a productive member of our society.

Participant “Carl” described his leadership style as “interesting” in his reflection, He said:

I am friends with my students and staff, but at the same time, I will hold them accountable for their actions as a person of authority. They know that no matter what, they can come to me with any issue, and although I will not judge them personally, I may have to make certain choices because of my position.

These answers reinforce the practice of transformational leadership over servant leadership.

Regarding transformational or transformative leadership, leaders want to encourage and inspire their students to be the best they can be by setting a good example for them to aspire toward, knowing that their students may eventually outgrow them and go beyond even what they know. In servant leadership, the leader gives their all (sometimes to their own detriment) to see their students succeed, but resources are finite. One of the responses from “Hannah” mentioned that their students and staff refer to them as “stern” but they still have a great relationship with their students at the high school level. This shows that they do use transformational leadership to set a good example and hold their students to a very high standard, and the students still respect their leader. This is shown through the students trying their best to do a good job and work hard for their Principal, showing respect for the authority and for the Principal’s position.

Furthermore, there were many examples of participants mentioning words such as “authoritative,” “assertive,” but some also mention “nurturing,” leadership styles, or being friendly with students and faculty, while still holding them accountable for their success, reinforcing the idea of transformative leadership in that they are making lasting changes in their students and faculty. Although none of the participants mentioned servant leadership explicitly, it is evident that some of them are giving a lot of themselves to help their students, as evidenced by “Hannah,” who mentioned that their therapist was a great support system and positively enriched the experience of the transition, allowing brainstorming and the implementation of new coping mechanisms. It follows that by taking care of themselves and making sure that they are mentally healthy and feeling good by seeing a therapist, they can serve their school better, making sure that they are balanced emotionally, mentally, and professionally. It is to this end that transformational leadership, also known as leading by example, is the primary focus of our participants.

Another theme that was common amongst the idea of leadership style in this section of the survey was the idea of “meaningful connections,” and making a lasting impression on students. Most of the participants mentioned this idea, in particular, participant “Abby” mentioned how much she enjoyed professional development focused around making meaningful connections with her students, “the in-services and workshops that I attended throughout the last couple years of being at this new school have been very helpful, especially ones about connecting with students (I particularly liked a PD that I did recently about “getting students speaking”), and managing time/self-care.” It is

clear that most of the participants of this survey have similar values when it comes to their leadership style. Comparing transformational leadership and servant leadership in this way, it is evident that most of the participants see their leadership style as more transformative, rather than serving their students and faculty. By making “meaningful connections” the leaders are inspiring a true change in their students, transforming them into members of society, and preparing them for the future.

Furthermore, if we examine and compare the experiences of the different participants in term of the environment of their transition in leadership, there are some more interesting conclusions to be drawn. Looking at the difference between those participants who transitioned voluntarily and comparing it to those who were requested to change, there is also an interesting fluctuation in the data. In terms of framing the school goals, the participants who transferred voluntarily had a significantly higher score than those who were requested to transfer, especially for the questions pertaining to staff input, and using student data. The participants’ responses in both the PIMRS and the Reflection Questions survey furthermore reinforce the idea of transformational leadership. An example is how the participants’ whose transition was voluntary rated the need for framing the school goals as 4.57/5.00, and the participants who were requested to transition rated it as a 4.00/5.00. This reinforces transformational leadership in that the idea of a shared mission to build a foundation for the future is one that is extremely important in the implementation of transformational leadership. Transformational leaders set an example for their followers to look up to and hopefully achieve or exceed in their

own endeavors. If the results reinforced servant leadership over transformational leadership, the idea of having a shared mission to work toward would not be present, instead the idea of giving up everything that a leader possibly can to help their followers get ahead would be present.

### Managing the Instructional Program

Managing the instructional program is another important theme that is observed in both the PIMRS and the Reflection Questions, and it brings about an interesting set of data to explore. This can be seen in Figures 5 and 6, where coordinating the curriculum is looked at in particular, allowing the exploration of how the data presents.

Fig 5. – PIMRS Data Table: Coordinating the Curriculum – Demographics

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Coordinate the Curriculum (Overall)</b>	4.20	4.27	4.17	4.20	4.40	4.20	3.80	4.00	4.35	4.30
16. Make clear who is coordinating curriculum	4.50	4.67	4.43	4.67	4.50	4.00	4.00	4.25	4.75	4.50
17. Results of testing for curricular decisions	3.90	4.33	3.71	3.67	4.50	4.00	4.00	3.75	4.00	4.00
18. Monitor classroom curriculum for objectives	4.20	4.00	4.30	4.17	4.50	4.00	4.00	4.00	4.25	4.50
19. Assess overlap between objectives and achievement	4.00	4.00	4.00	4.17	4.00	4.00	3.00	3.75	4.25	4.00
20. Participate in reviewing curricular materials	4.40	4.33	4.43	4.33	4.50	5.00	4.00	4.25	4.50	4.50

Fig. 6 – PIMRS Data Table: Coordinating the Curriculum – Leadership Setting

Leadership Setting:	ES-- >HS n=7	HS-- >ES n=3	Voluntary n=8	Request n=2	Same Dist n=7	Diff Dist n=3	Dist 1 n=4	Dist 2 n=1	Dist3 n=2	Dist 4 n=2	Dist 5 n=1
<b>Coordinate the Curriculum (Overall)</b>	4.20	4.20	4.25	4.20	4.20	4.20	4.05	3.80	4.60	4.20	4.40
16. Make clear who is coordinating curriculum	4.57	4.33	4.50	4.50	4.60	4.50	4.50	4.00	4.50	4.50	5.00
17. Results of testing for curricular decisions	3.86	4.00	4.00	3.50	3.71	4.33	3.50	4.00	4.50	4.00	5.00
18. Monitor classroom curriculum for objectives	4.14	4.33	4.25	4.00	4.14	4.33	4.00	4.00	5.00	4.00	4.00
19. Assess overlap between objectives and achievement	4.14	3.67	4.00	4.00	4.14	4.00	4.00	3.00	4.50	4.00	4.00
20. Participate in reviewing curricular materials	4.29	4.67	4.50	4.00	4.43	4.25	4.75	4.00	5.00	4.50	4.00

Looking at coordinating the curriculum, there is some interesting data that prompts the conclusion that this theme of managing the instructional program is very important to leadership and the transition from one setting to another, which also reinforces transformational leadership; making a noticeable change in the students to help them prosper. If the overall average of 4.20 out of 5.00 is considered, it can be seen that this theme is very important to the participants, and therefore to those in leadership.

One place where a fluctuation can be seen is in Fig. 6, looking at district two. The overall average for this section of the PIMRS is significantly lower than the other districts, as are the majority of the answers to the questions. This brings about a question

of whether or not this district values coordinating the curriculum in the same way as those in other districts whose scores were similar and rated significantly higher.

There is an additional section of the PIMRS where there is some discrepancy. This is between the male and female participants, particularly in terms of question two, pertaining to using the results of testing for curricular decisions. The data revealed that female participants rated the question pertaining to using results of testing for curricular decisions lower (3.71/5.00 and 4.17 average for this section of the PIMRS) than the male participants (4.33/5.00 and 4.27 average for this section of the PIMRS). This interesting difference between males and females prompts the question of how both males and females can be better supported (by gender) in transition so that they are better able to embody the ideas of their style of leadership. Based on the female participants' scores in this section, this singular variable could help to support the exploration that female participants might view themselves more as servant leaders in regard to this particular PIMRS question. As proffered by Williams & Hatch (2012), servant leaders build community and often put the needs of others before themselves. Conversely, it can be suggested for further research if male participants might exercise transformational leadership in this particular PIMRS area, as evidenced by the minute difference for this question in this study between the genders. In transformational leadership, one takes the resources that they are given, in this case the results of testing, to better support their students and faculty. It would be interesting to understand if there are valid and reliable



gender differences in the way that participants are using or reasons they are not using the resources or fully embodying the idea of transformational of servant leadership.

### **Maintaining a Positive Learning Climate**

Another overarching theme of both the PIMRS survey and the Reflection Questions survey is the idea of developing and maintaining a positive learning climate. The results of the PIMRS survey questions in this section varied in an interesting way, which will be compared to the reflection survey answers to make conclusions and draw connections to consider some of the questions.

Fig 7 – PIMRS Data Table: Promote Professional Development – Demographics

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Promoting Professional Development (Overall)</b>	3.88	3.67	3.97	4.03	3.70	3.60	3.60	3.80	3.90	4.00
41. Ensure that PD activities are aligned with school goals	4.50	4.00	4.71	4.67	4.50	4.00	4.00	4.25	4.75	4.50
42. Support the use in classroom of skills and PD	4.20	4.00	4.29	4.33	4.00	4.00	4.00	4.25	4.25	4.00
43. Get participation of school staff in PD activities	3.40	3.33	3.43	3.50	3.50	3.00	3.00	3.25	3.25	4.00
44. Lead/attend teacher PD regarding instruction	3.20	3.33	3.14	3.33	3.00	3.00	3.00	3.00	3.25	3.50
45. Make time during meetings for teachers to share PD ideas	4.10	3.67	4.29	4.33	3.50	4.00	4.00	4.25	4.00	4.00

Fig. 8 – PIMRS Data Table: Providing Incentives for Learning – Leadership Setting

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Providing Incentives for Learning (Overall)</b>	3.88	3.67	3.97	4.03	3.70	3.60	3.60	3.80	3.90	4.00
46. Recognize students who do superior work with rewards	4.50	4.00	4.14	4.67	4.00	4.00	4.00	4.25	4.75	4.50
47. Use assemblies to honor students for academics and behavior	4.20	4.00	4.29	4.33	4.00	4.00	4.00	4.25	4.25	4.00
48. Recognize students in the office for their work	3.40	3.33	3.57	3.50	3.50	3.00	3.00	3.25	3.25	4.00
49. Contact parents to share good performance and contributions	3.20	3.33	4.00	3.33	3.50	3.00	3.00	3.00	3.25	3.50
50. Support teachers in their recognition of students in class	4.10	3.67	4.14	4.33	3.50	4.00	4.00	4.25	4.00	4.00

In this part of the survey, questions about incentives and professional development are raised, and we see middle-scoring ratings when it comes to things like taking the time to talk informally with colleagues and students and visiting classrooms to discuss school issues with teachers. The predominant number of participants rated most of these questions with a score of 3.00 or above. This also included the PIMRS questions related to covering classes or tutoring/providing direct instruction.

Furthermore, many participants talked about incentivizing goals for both the faculty and the students. One participant in particular, “Daisy,” mentioned that they had

great success with incentivizing goals, with their school meeting and exceeding the goals set at the beginning of the year, earning some kind of reward: “I connect most with the section about providing incentives for learning. To me, this is such a great idea, and it is something that I personally have had a lot of success with. Offering a reward of some sort for good, hard work has been very successful at our school.” The consistent theme of meaningful incentives is pervasive in educational literature, as it is common practice that members of a school community tend to work harder if there is an incentive that is practical and associated with the goals and mission of the school or organization.

In terms of leadership types, the data supported that participants’ leadership styles were challenged in certain areas, which can directly affect the efficacy of transformational and servant leadership. In reviewing this section only, it appears that the overall ratings were lower in the areas of recognizing students in the office for their work (3.40/5.00) and contacting parents to share good performance and contributions (3.20/5.00). Whether it is the cause of *too much* servant leadership, prompting leaders to need a break to replenish their own personal resources or something else that resulted in the ratings, or other variables, this fluctuation was interesting and surprising.

Transformative leaders ultimately preserve their personal resources, setting a model example for a healthy and successful future for their students and faculty. These transformational leaders work diligently to provide positive incentives for student in an effort to promote a positive school culture and climate. Ultimately, this includes talking

informally and providing tutoring and instruction directly to students, as a way to impact instruction.

In terms of providing incentives for teachers and students in this section, we see relatively high scores, with the lowest being rated at an average of 3.20 out of 5.00 and highest being rated at 4.50 out of 5.00, meaning that our participants are comfortable with incentives for hard work paying off, and do their best to reinforce morale when their colleagues and students are doing a good job of maintaining the standards of the shared mission. Transformative leadership is demonstrated by leaders inspiring change throughout their schools by meeting required goals to achieve success in their school communities, society, all while building a foundation for their futures.

### Support

The surveys go on to ask about describing transition from one setting to the next, asking participants to consider what factors made their transition easier or more difficult. The answers here had a common theme: support, which was essential in their transition.

Fig 9 – PIMRS Data Table: Promoting Professional Development - Demographics

Personal Demographics:	Overall Avg. n=10	Male n=3	Female n=7	White n=6	Black n=2	Hispanic n=1	Asian n=1	Age 31-40 n=4	41-50 n=4	51-60 n=2
<b>Promoting Professional Development (Overall)</b>	3.96	3.80	4.03	3.97	4.30	3.80	3.40	3.80	4.15	3.90
41. Ensure that PD activities are aligned with school goals	4.00	3.67	4.14	3.83	4.50	4.00	4.00	4.00	4.00	3.50
42. Support the use in classroom of skills and PD	4.20	4.00	4.29	4.17	4.50	4.00	4.00	4.00	4.25	4.50
43. Get participation of school staff in PD activities	3.600	3.67	3.57	3.50	4.00	4.00	3.00	3.50	3.75	4.00
44. Lead/attend teacher PD regarding instruction	3.9	3.67	4.00	4.00	4.50	3.00	3.00	3.50	4.50	4.00
45. Make time during meetings for teachers to share PD ideas	4.10	4.00	4.14	4.33	4.00	4.00	3.00	4.00	4.25	4.00

Fig. 10 – PIMRS Data Table: Promoting Professional Development – Leadership Setting

Leadership Setting:	ES-->HS n=7	HS-->ES n=3	Voluntary n=8	Request n=2	Same Dist n=7	Diff Dist n=3	Dist 1 n=4	Dist 2 n=1	Dist3 n=2	Dist 4 n=2	Dist 5 n=1
<b>Promoting Professional Development (Overall)</b>	3.86	4.20	4.10	3.40	3.94	4.00	3.60	3.40	4.30	4.50	4.20
41. Ensure that PD activities are aligned with school goals	3.71	4.67	4.25	3.00	3.86	4.33	3.50	4.00	4.50	4.50	4.00
42. Support the use in classroom of skills and PD	4.00	4.67	4.25	4.00	4.14	4.33	4.00	4.00	4.50	4.50	4.00
43. Get participation of school staff in PD activities	3.56	3.67	3.75	3.00	3.57	3.67	3.25	3.00	4.00	4.00	4.00
44. Lead/attend teacher PD regarding instruction	3.86	4.00	4.00	3.50	3.86	4.00	3.50	3.00	4.00	4.50	5.00
45. Make time during meetings for teachers to share PD ideas	4.14	4.00	4.25	3.50	4.28	3.67	3.75	3.00	4.50	5.00	4.00

Participant “Ernie” stressed that support was key in his successful transition, and he wished he had had even more support:

During my transition, the main thing I needed was someone telling me that I was doing the right things, or just explaining how *they* had handled situations and experiences as the principal. It was great to have a supportive faculty and supportive students, but I wish I had had time to sit down with someone who had done this exact job before so they could impart some of their own experiences on me.

It seems like every single participant mentioned that a support system is super important, whether you already have one, or looking for one once you arrive in your new setting. Each participant had their own experience with a support of some sort or wished that they had had a support that made their transition easier, and reinforced that they were on the right track. Participants mentioned that faculty were helpful, and one participant, “Hannah” mentioned that although it was not easy to gain the respect of the students immediately, she was able to win them over and have them respect her:

My transition was, honestly, relatively uneventful. I had a great faculty that welcomed me into the new school, and although it took a little bit of time to gain respect from the students, we have a good rapport now after a few years, and they are meeting expectations regularly. I am very proud of their hard work.

When asked what they needed or wished they had had during their transitions, the participants all mentioned one thing: some kind of support. Many wished that they had had a guide of some sort, whether it be a workshop or in-service, or a support group of some sort with educators who have made similar transitions, the answers all varied on this same theme of supporting those in transition. This was something that was particularly interesting, because many of the participants made their own support systems, because they found what was offered lacking. Some, such as participant “Daisy” even went as far as to look on social media for support from teachers also in the State:

During my transition, I found a group on social media that helped me a lot.

It was a bunch of Indy educators who all support each other, and this was



a huge asset to me in my transition. Having a group that I could bounce ideas off of, and who had been through similar experiences was super helpful and I don't think I would be as comfortable as I am now without their help! I have also made some lifelong friends who all share similar interests to me, which is great!

In the final section of the Reflection Questions, participants were asked what kind of feedback they would give to a leader experiencing a transition, and what they would say to district-level leaders who support leadership assignments. In terms of feedback for those in transition, the majority of answers included things such as “just go for it!” or “take the leap!” Some participants said that they were happy that they made the transition that their gut was telling them to do so, and that others should listen to their gut if they feel or felt like something needed to change. Others mention that reaching out for support should not be as difficult as it is and finding a support system made their transition much smoother. Participant “Daisy” stressed how important it is to just “take the leap” in her response:

I would tell someone in transition to just take the leap if you feel it's time!

Making the change was the best thing possible for my mental health, and I feel like I am doing a much better job in this position than my previous one. Here, I feel like I am really making a difference, instead of just trying to keep my head above the water.

In reference to the district-level leaders, “Daisy” goes on to say:

To those who support leadership assignments, I would say there should be more mental health support for our teachers and administrators. We deal with a lot of heavy topics quite often, and this can be detrimental if we do not have someone to talk to.

There was a common theme of support, yet again found in these responses. Many participants mentioned that there should be some sort of support for those transitioning between education settings, and how that would have been a game-changer for their transition. “Felix” stressed this in his response:

To leaders who support leadership assignments, I think it would be helpful to offer more support or some kind of workshop about transitioning from elementary to high school, or even from high school to elementary school. This could be a great asset to administrators all over the district and the State.”

Most participants built their own support system, but they all mentioned that had there already been one in place, that would have been great.

One area where a discrepancy can be seen in the PIMRS results are the questions pertaining to ensuring that professional development activities are aligned with school goals, and making time during meetings for teachers to share professional development ideas. The fluctuation occurs between the participants in districts 1 and 2, and the participants in districts 3, 4 and 5. The participants in the first two districts show much lower scores than the participants in other districts. This prompts many questions about

the support being provided to participants in each district. Perhaps the participants in districts 1 and 2 are feeling less supported than the participants in other districts, which would mean that more support can be provided to those in the first two districts so that they feel more comfortable listening to input regarding professional development. If the leaders are truly embodying the idea of transformational leadership, they would take into account the needs and wants of their teachers, taking into consideration the feedback that teachers are giving them in order to plan professional development workshops that will benefit their teachers in their journey to transform their learners into functioning members of society.

Comparing the experience of the different participants, it can be seen by looking at the averages of the importance of having a shared mission and proper support, that every single participant counts this as an important part of their journey. The PIMRS results and the reflection results bring about many common themes, but there is one that every single participant conveyed in both the PIMRS and the reflection questions: support. In both the PIMRS and the reflection questions, participants expressed that support was the biggest factor in determining whether their transition was positive or negative. Those who had a built-in support system boasted a positive experience, and those who did not have a big support system around them explained how they made their own, and how it was more difficult of a transition without a lot of support. Because working in education is such an intense commitment, it is important that administrators find places to get support if needed, especially if they are feeling worried and stressed.

One participant in particular, “Hannah,” mentioned that their therapist was vital in helping them through their transition, teaching them coping mechanisms and strategies for dealing with stress in their new environment. The common theme here of support is one that could definitely be taken into consideration when making decisions in the future to help not only instructional leaders in transition, but anyone who transitions from one job to another in any field.

In reference to whether the new level of education was more or less difficult than the previous, one particular answer stood out, and it would be interesting to explore this further. Participant “Isabel” mentioned that they did not find the new setting more or less challenging at all, which many participants touched on in their response, but they described instead that the new setting was just a completely different environment, needing a completely different approach:

I wouldn’t say that leadership at this level is more or less challenging than the elementary level, but it is definitely different. You are dealing with a whole different circus here, with more mature themes, and sometimes rather heavy situations. Although I wouldn’t say it is more or less challenging, I would say that it has changed me and made me more passionate about turning my students into good humans.

One example that participant “Felix” described was that that they had to manage their expectations because of the change of level of education and maturity:

One of the difficulties I had transitioning to high school leadership was navigating the different experiences of all the students. Our student population varies, with some students coming from wealthy families, and others coming from not-so-wealthy families, and navigating the politics of the high school can be a little overwhelming. One thing that really helped me with this transition from elementary to high school was my colleagues – the new and the former ones! I am still in contact with many of my mentors and former colleagues, and I was able to reach out to them for advice, which was priceless!

Furthermore, it was mentioned on many occasions that a big change was going from high school to elementary school, where educators are working with teenagers, who are about to entire society, and they have to readjust their expectations of their elementary students, who are just learning the ways the world works. Judging from these responses, it is clear that a different approach is needed in the two different education settings. Participants were asked to describe their leadership style *now*, post-transition, and there was a common theme of change. Almost every participant mentioned that they had to re-think their approach to instruction and leadership in order to best handle their new environment. Again, participants mention that they have to adjust their expectations based on which level they are transitioning to. Participant “Jenny” had an experience like this, where she had to manage her expectations based on her transition from one level to another:

Instructionally, my leadership is less extreme than when I was working in the high school, because you simply cannot approach elementary students in the same way you would approach a high school student. I do not find it more challenging than the high school level, but it is a very different environment that warrants a very different approach.

When the participants were asked which of the themes of the PIMRS resonated with them. The answers here varied, with quite a few different choices. A few chose the framing school goals and communicating goals section, citing that communicating the goals of the school to students and faculty was a good way to set their expectations and set personal and professional goals for the year. For example, participant “Abby” said:

The theme that connected to me the most was the framing and communicating the school goals sections. These resonated with me because I have been at this school for a few years now, and I think the environment is a positive one that students can really thrive in, and for this reason, I try to frame and communicate the goals to the students and faculty on a regular basis, keeping them on track for success.

Others chose the visibility section, saying they felt that they led by example, so that section really resonated with them. An example of this is participant “Bonnie” who wrote:

The theme that connected to me the most was the framing and communicating the school goals sections. These resonated with me because I have been at this school for a few years now, and I think the environment is a positive one that students

can really thrive in, and for this reason, I try to frame and communicate the goals to the students and faculty on a regular basis, keeping them on track for success.

A particularly interesting trend was that a few participants chose the incentives for learning section and incentives for teachers, saying that they have had great success in setting goals with their students and faculty, and rewarding them for meeting and exceeding expectations. Participant “Jenny” was one of the participants who felt this way:

I think that I connect most to the PIMRS theme of providing incentives for teachers. Especially in today’s day and age, teachers and faculty at schools go above and beyond their usual duties, often sacrificing their own personal time, making sure that their students are having the best experience possible, and learning as much as they can.

## CONCLUSIONS



## **Conclusions**

When beginning this exploration, instructional leadership was defined as the leadership approach wherein the school leader collaborates with teachers, to provide both support and guidance to establish the best teaching practices for students (Brolund, 2016). This means that instructional leadership is student-oriented, as the school leaders and teachers collaborate to ensure the students have the best possible learning experience, graduating with the required skills and competencies to continue in their learning journey, and beyond (Spillane et al., 2003). To this end, the role of the school leader is not only to provide instruction to the teachers, but to work in partnership with them to provide the necessary professional development tools that can complement their pedagogical practices and different approaches. In the conclusion, the results of our research and exploration will be looked at in conjunction with the theory of instructional leadership to give ideas as to how the transition process can be improved. There were a number of themes that were present in both the PIMRS and the Reflection Questions survey. Many of these will be touched on, helping exemplify how those who choose school leaders can improve the transition, before discussing next steps for further research.

This exploration provided insights into instructional leadership in transition between elementary to high school, or high school to elementary school, that will allow those choosing school leaders to find ways to better help their colleagues in transition. The common theme of support was present in all the PIMRS and Reflection Questions

results, leading to the conclusion that more support is needed for those transitioning from either level to the other. Furthermore, support could include things like communicating a shared mission, and making school-wide goals for leaders as well as student, with incentives to keep their morale up, among many other things. Further looking at the idea of support, and comparing that to the definition of instructional leadership, it is evident that this part of transition can be improved in the future.

If instructional leadership is not only supporting teachers personally, but also supporting their pedagogical practices and different approaches, then there can definitely be some improvement in the future for supports for those transitioning to another level of education. Some of the participants made their own support group via social media, so maybe this is something we can learn from and take into the future of instructional leadership in transition. Having a place for those who are transitioning now to talk to those who have already transitioned would be an invaluable resource. Those who have already experienced transition have a different point of view from those who have not, and can impart vital wisdom unto those newly transitioning, allowing them to almost have a “cheat sheet” of what they can do to make the change smoother.

Many of the participants mentioned that either the support that they had was vital in their successful transition, or the lack of support really hindered them in their transition, which is why they went and found their own support. To this end, the conclusion can be drawn that support for transitioning leaders is vital and is something that can be focused on in the future to improve the environment for all involved. If the

teachers and school leaders are not properly supported, it follows that they would not be able to do their best at work, and therefore, cause the students to suffer, and not be prepared for future education and/or entering general society.

The idea of a shared mission is one that was also evident in the exploration as being vital to the transition of individuals in leadership, and this was reinforced in both the PIMRS results, as well as the Reflection Questions responses. In terms of instructional leadership, a shared mission is vital to success. If those in leadership do not have a shared mission, then how will they know what the ultimate goal they are working toward is? By having a shared mission and reinforcing that by sharing it with all school leaders and faculty, successful instructional leadership, where teachers are being supported by their higher-ups, allows the teachers to do a better job of maintaining their pedagogical practices, and therefore achieve the goal of educating the students so that they are ready to graduate to the next level of education or even life. Furthermore, a shared mission leans toward the theory of transformational leadership that has been discussed previously, in that it inspires a change in students and faculty, giving them goals and objectives to work toward, and allowing leaders to impart their wisdom on the students and faculty, setting a strong foundation for future endeavors, all the while preserving the personal resources of leaders, so that they can also continue their own journey.

Through this self-reflective practice, which is essential for growth as an educator, it is evident that transformative leadership is present in many educators' practices, even if

they do not describe themselves as a transformative leader. Although the terms of “transformative leader” were not explicitly used in the participants’ responses, each of them embodied at least one aspect of transformative leadership, in that they are trying to preserve their own personal and mental resources by finding a support system to help them through the transition, all the while setting a standard for the students to meet by showing them what it means to be a good person and a successful and productive member of this society. Leadership style determines how an educator interacts with their students, and by using transformational leadership rather than servant leadership, our participants are allowing themselves to continue to grow and achieve great things through their students and faculty being successful.

### **Next Steps for Further Research**

In the future, there are many interventions and further exploration that can be done to continue this type of research and hopefully make a positive impact on the experience of educators in transition. Looking at the results of this exploration, it can be seen that support is the most important part of a leader’s transition from elementary to high school, or high school to elementary school. Going forward, further research can be done about leaders in transition, looking into what particular supports are needed or could be created for those transitioning. There are many different types of support that could be needed by those transitioning, including mental, physical, or financial support. Many of the participants mentioned that a support group of some sort was extremely beneficial to them, whether it was one that they created themselves, or one that they found on social

media, so this is something that could be explored further to see what exactly those choosing leaders can do to help with transition. If this is done, and administrators and those in leadership can create support groups for transitioning leaders, then higher morale and more information about transitioning can be provided to leaders transitioning educational levels, allowing them to preserve their personal resources, and successfully use transformative learning to set goals and expectations for faculty and students. By allowing those who have already transitioned educational levels to share their wisdom with those in transition, it could positively affect the turnover rate of educators, and help with those who have been needing to take mental health breaks such as stress leave. If those in education administration and leadership are able to stop leaders from experiencing things like burnout, then they will ultimately be more productive and have more success with their subordinates.

More research into the section of the PIMRS about monitoring student success would also be an interesting exploration to continue to research. This section of the PIMRS had much lower average answers of 3.20 to 4.00, unlike other sections with higher average scores. It would be very interesting to compare this section of the PIMRS survey to a future study's reflection answers, as one could explore why individual meetings regarding student success and performance, discussing academic performance results with the faculty, informing faculty of school's performance in written form, as well as using rest and other performance measures to assess progress toward school goals, and informing students of school's academic progress were rated with such

fluctuation, the average falling as low as 3.20 in some sections. It is suspected personally that this section rated so interestingly because leaders are practicing some servant leadership, and potentially burning themselves out to give their students the best experience and the best leaders they can have. With transformative leadership, there would be some inspired change, as well as forms of self-care to preserve personal resources. If the leaders are unable to give feedback about performance, there must be a reason why.

Furthermore, more exploration into the different styles of leadership is recommended. It is evidenced by this exploration that transformative/transformational leadership is one that is more self-preserving than servant leadership, in that transformative leadership allows the leader to lead by example, showing their students and faculty what they can achieve if they set their minds to it and work hard, rather than servant leadership where the leader is just doing anything in their power to help their students and faculty to succeed, sometimes at their own detriment. What could be explored here is: which is the more appropriate practice? One could argue after this exploration that transformative leadership helps leaders take care of themselves in order to help their faculty and students thrive, better than servant leadership. But under what circumstances is servant leadership an appropriate leadership style for transitioning leaders to practice? Another aspect that would be interesting to explore further would be how the experience in each environment is different from the other.

This study examined the leadership transition of a small number of participants in a single midwestern urban city. In the future, a larger sample size could be explored, which would allow even more exploration into the leadership styles and transition experience of those in leadership. Future research could explore the sample size of an entire state, in order to explore whether the same pattern occurs in a broader setting. In this sample, it is evident that transformative leadership was the more prominent practice for the participants, rather than servant leadership, in that the participants talked about making connections with their students and faculty, building a foundation for their futures, and preserving their own personal resources. With a larger sample size, it could be explored whether the same pattern is evident, or if servant leadership would be practiced by any educators.

After exploring this topic of leadership in transition, and exploring the efficacy of different types of leadership, the data shows us the participants' experience of transitions in leadership from elementary to high school, or high school to elementary school. It was evident that transformational leadership is the more prominent practice among our sample group, but this begs the question: does this mean that transformative leadership is better than servant leadership? If more leaders are finding a positive experience from the practice of transformational leadership, where they can save their own personal resources, does that mean that servant leadership should be re-evaluated for its efficacy? What benefits come from servant leadership, when one must give everything that they have to their subordinates, even if it means their own detriment? Are there more benefits

to transformative leadership than servant leadership? Could it be the other way around? It would be interesting to compare the two directly and survey leaders about their thoughts.

One piece of data that is particularly interesting is the idea that the younger leaders in transition who participated in this study do not value the idea of a shared mission as much as the older participants. The data shows on more than one occasion that the 31–40-year-old participants scored the importance of a shared mission and communicating that shared mission much lower than the participants of older age groups (Fig.1, Fig. 2). This does prompt some questions that would be interesting to explore. If one were to take a larger sample size, would this same theme reflect in the data? Does this mean that a new type of movement is coming, and the older individuals will soon be seen as “old school” and obsolete? Is there something that can be done for younger leaders in transition to help them reinforce the idea of a shared mission? More research could certainly be done into this idea to further support young leaders who are transitioning in any direction.

Finally, more interactive research for exploring leadership in transition could be conducted in the future, with more probing survey questions for participants, which would allow further exploration into the types of leadership that are best used in practice, as well as how to improve the process of transition for leaders in education, going from any level to another. This could include the impact of gender and millennial groups during a transition in assignment. The data from an exploration such as this one, or more research could greatly benefit those in the future who transition between any level of



education. This exploration provides evidence as to how we can improve the transition for those in the future, and along with more research, concrete steps can be taken to make positive changes and add more supports for those who need it.

## APPENDICES

### **Appendix A: Solicitation Email**

Subject: Instructional Leadership Research  
 Subhead: You can contribute to Educational Research

Dear (NAME),

I am conducting research on the determinants of instructional leadership efficacy for school leaders in transition from the elementary to the secondary school environments. Specifically, I wish to probe into the instructional leadership approaches that are used by school leaders in transition; draw parallels and distinctions between instructional leadership approaches in the primary and secondary school environments, and understand the specific strategies that are used in transition from elementary to high school leadership or high school to elementary school leadership. The purpose of the research is to gather actionable evidence that can be used to promote more effective instructional leadership strategies by school leaders in transition, which in turn has significant practical, theoretical, and pedagogical value.

Would you like to assist in this study? Please kindly review the eligibility criteria below and inform me of your interest if you qualify:

***Who can participate:***

- Principals and/or assistant principals in Indiana
- Principals and/or assistant principals who are transitioning, or who have transitioned from elementary to high school, or vice versa in the last 5 years

***Why should you participate:***

- To contribute towards current knowledge on effective instructional leadership strategies
- To gain access to informative resources that can be used to support and enhance instructional leadership during a school setting transition

Participation in the proposed research will allow participants to provide feedback on their relative efficacy during, and perhaps after, a transition from elementary to high school (or vice versa) leadership.

Kindly respond to this email with an expression of interest within 3 to 5 days. Subsequently, I will contact you with a screening survey as well as an informed consent form that will be critical prerequisites for participation in the study.

Sincerely,  
 Corye Franklin

### **Appendix B: Screening Tool/Questions**

The screening tool will be in the form of a brief survey administered to school leaders expressing an interest in the study. Its purpose is to ensure the school leaders meet the eligibility criteria and have some foundational knowledge that underscores their ability to participate in the study. The survey questions are as follows:

- How did you find out about the study? (possible answers: solicitation email; colleague).
- Have you worked as a school leader in an elementary school environment?
- When did you work as a school leader in an elementary school environment?
- Have you worked as a school leader in a high school environment?
- When did you work as a school leader in a high school environment?
- Are you familiar with instructional leadership?
- In one to two sentences, please explain what instructional leadership means to you.
- What age are you? (possible responses: 20-30; 31-40; 41-50; 51-60; 60-64; 65 and over)
- What is your ethnic identity (possible responses: Asian; Hispanic/Latino; African American/Black; Caucasian; Other; Prefer not to say)
- What is your gender? (possible responses: Male; Female; Non-binary; Prefer not to say)
- Have you transitioned from an elementary to a high school environment or vice versa as a school leader? When?
- Are you familiar with the broad purpose of the research?
- Are you interested in participating in the research?
- Are you aware there are no financial benefits to participating in the research?
- Do you have any preliminary concerns about participating in the research? If so, could you state them as briefly as possible?
- In one or two sentences, please explain what you seek or anticipate gaining from participating in the research.
- Do you have access to a personal and secure computer?

## **Appendix C: Informed Consent Form**

**Title of Study:** School Leaders' Instructional Leadership After a Change in Assignment:  
A comparative analysis of school leaders' instructional effectiveness in the transition between school settings.

**Principal Investigator, Affiliation and Contact Information:**

Corye Franklin, Marian University EdD candidate  
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 317.413.8847

**Institutional Contact:**

Kurt Nelson, Ph.D., Faculty Advisor  
 317-955-6421  
[knelson@marian.edu](mailto:knelson@marian.edu)

### **1. Introduction and Purpose of the Study**

I am conducting research on the determinants of instructional leadership efficacy for school leaders in transition from one school setting to another (elementary to secondary or vice versa). Specifically, I wish to probe into the instructional leadership approaches that are used by school leaders in transition; draw parallels and distinctions between instructional leadership approaches in the primary and secondary school environments, and understand the specific strategies that are used in transition. The purpose of the research is to gather actionable evidence that can be used to promote more effective instructional leadership strategies by school leaders in transition, which in turn has significant practical, theoretical, and pedagogical value.

### **2. Description of the Research**

A survey will be given out first to find appropriate candidates, who will then be asked to reflect on their instructional effectiveness, and to provide feedback on their relative efficacy in their transition over the last ten years. Participants will then be given the PIMRS to identify specific strategies and themes associated with instructional efficacy.

### **3. Subject Participation**

Participation criteria are as follows:

- Principals and/or assistant principals in the state of Indiana

- Principals and/or assistant principals who have transitioned from an elementary to a secondary school environment

Participants will be asked to complete a preliminary screening survey (approximately 10 minutes) before participating.

#### **4. Potential Risks and Discomforts**

No known risks

#### **5. Potential Benefits**

- To contribute towards current knowledge on effective instructional leadership strategies
- To gain access to informative resources that can be used to implement instructional leadership in the transition from elementary to secondary school environments

#### **6. Confidentiality**

All information taken from the study will be coded to protect each subject's name. No names or other identifying information will be used when discussing or reporting data. The investigator will safely keep all files and data collected in a secure location/area. Once the data has been fully analyzed it will be destroyed.

#### **7. Compensation**

Subjects will not be compensated for participation in this study.

#### **8. Voluntary Participation and Withdrawal**

Your decision to participate in this study is completely voluntary. If you decide to participate in this study, you may withdraw from your participation at any time without penalty.

**10. Cost/Reimbursements**

There is no cost for participating in this study.

I voluntarily agree to participate in this research program

☐ Yes

☐ No

I understand that I will be given a copy of this signed Consent Form.

Name of Participant (print):

Signature:

Date:

Appendix D: Principal Instructional Management Rating Scale (PIMRS)

## PRINCIPAL INSTRUCTIONAL MANAGEMENT RATING SCALE

### Principal Form

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### Principal Form 2.1

#### THE PRINCIPAL INSTRUCTIONAL MANAGEMENT RATING SCALE

**PART I:** Please provide the following information if instructed to do so by the person administering the instrument:

(A) District Name: \_\_\_\_\_

(B) Your School's Name: \_\_\_\_\_

(C) Number of school years you have been principal at this school:

\_\_\_ 1                      \_\_\_ 5-9                      \_\_\_ more than 15

\_\_\_ 2-4                      \_\_\_ 10-15

(D) Years, at the end of this school year, that you have been a principal:

\_\_\_ 1                      \_\_\_ 5-9                      \_\_\_ more than 15

\_\_\_ 2-4                      \_\_\_ 10-15

(E) Gender: \_\_\_ Male \_\_\_ Female



**PART II:** This questionnaire is designed to provide a profile of your leadership. It consists of 50 behavioral statements that describe principal job practices and behaviors. You are asked to consider each question in terms of your leadership over the past school year.

Read each statement carefully. Then circle the number that best fits the specific job behavior or practice as you conducted it during the past school year. For the response to each statement:

5 represents *Almost Always*

4 represents *Frequently*

3 represents *Sometimes*

2 represents *Seldom*

1 represents *Almost Never*

In some cases, these responses may seem awkward; use your judgement in selecting the most appropriate

response to such questions. Please circle only one number per question. Try to answer every question. Thank you.

Principal Form 2.1

## **To what extent do you . . . ?**

### **I. FRAME THE SCHOOL GOALS**

1. Develop a focused set of annual school-wide goals

ALMOST NEVER

ALMOST ALWAYS

1                      2                      3                      4                      5

2. Frame the school's goals in terms of staff responsibilities for meeting them

ALMOST NEVER

ALMOST ALWAYS

1                      2                      3                      4                      5

3. Use needs assessment or other formal and informal methods to secure staff input on goal development

ALMOST NEVER

ALMOST ALWAYS

1                      2                      3                      4                      5

4. Use data on student performance when developing the school's academic goals

ALMOST NEVER

ALMOST ALWAYS

1                      2                      3                      4                      5

5. Develop goals that are easily understood and used by teachers in the school

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

## II. COMMUNICATE THE SCHOOL GOALS

6. Communicate the school's mission effectively to members of the school community

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

7. Discuss the school's academic goals with teachers at faculty meetings

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

8. Refer to the school's academic goals when making curricular decisions with teachers

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

9. Ensure that the school's academic goals are reflected in highly visible displays in the school (e.g., posters or bulletin boards emphasizing academic progress)

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

10. Refer to the school's goals or mission in forums with students (e.g., in assemblies or discussions)

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

## III. SUPERVISE & EVALUATE INSTRUCTION

11. Ensure that the classroom priorities of teachers are consistent with the goals and direction of the school

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5

12. Review student work products when evaluating classroom instruction

ALMOST NEVER			ALMOST ALWAYS	
1	2	3	4	5



23. Use tests and other performance measure to assess progress toward school goals  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
24. Inform teachers of the school's performance results in written form (e.g., in a memo or newsletter)  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
25. Inform students of school's academic progress  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5

## VI. PROTECT INSTRUCTIONAL TIME

26. Limit interruptions of instructional time by public address announcements  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
27. Ensure that students are not called to the office during instructional time  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
28. Ensure that tardy and truant students suffer specific consequences for missing instructional time  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
29. Encourage teachers to use instructional time for teaching and practicing new skills and concepts  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
30. Limit the intrusion of extra- and co-curricular activities on instructional time  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5

## VII. MAINTAIN HIGH VISIBILITY

31. Take time to talk informally with students and teachers during recess and breaks  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
32. Visit classrooms to discuss school issues with teachers and students  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
33. Attend/participate in extra- and co-curricular activities  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5
34. Cover classes for teachers until a late or substitute teacher arrives  
 ALMOST NEVER ALMOST ALWAYS  
 1 2 3 4 5

35. Tutor students or provide direct instruction to classes

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

### **VIII. PROVIDE INCENTIVES FOR TEACHERS**

36. Reinforce superior performance by teachers in staff meetings, newsletters, and/or memos

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

37. Compliment teachers privately for their efforts or performance

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

38. Acknowledge teachers' exceptional performance by writing memos for their personnel files

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

39. Reward special efforts by teachers with opportunities for professional recognition

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

40. Create professional growth opportunities for teachers as a reward for special contributions to the school

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

### **IX. PROMOTE PROFESSIONAL DEVELOPMENT**

41. Ensure that inservice activities attended by staff are consistent with the school's goals

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

42. Actively support the use in the classroom of skills acquired during inservice training

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

43. Obtain the participation of the whole staff in important inservice activities

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

44. Lead or attend teacher inservice activities concerned with instruction

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

45. Set aside time at faculty meetings for teachers to share ideas or information from inservice activities

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

## **X. PROVIDE INCENTIVES FOR LEARNING**

46. Recognize students who do superior work with formal rewards such as an honor roll or mention in the principal's newsletter

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

47. Use assemblies to honor students for academic accomplishments or for behavior or citizenship

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

48. Recognize superior student achievement or improvement by seeing in the office the students with their work

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

49. Contact parents to communicate improved or exemplary student performance or contributions

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

50. Support teachers actively in their recognition and/or reward of student contributions to and accomplishments in class

ALMOST NEVER

ALMOST ALWAYS

1

2

3

4

5

As described in the Technical Report there are over 200 PIMRS studies that have been conducted around the world. If you are doing research with the PIMRS it will benefit you greatly to identify other studies that are focusing a similar topic (e.g., gender, effects of instructional leadership on school climate etc.). Similarly, if you are doing research outside of the USA, you may find related studies in your own country (e.g., Thailand, China, Pakistan, Zambia). Again, it will benefit you to read those studies.

To facilitate your search process, you may download the [full LIST of PIMRS STUDIES by clicking on this link.](#)

Once you have identified studies that interest you, you may be able to find the relevant pdf file in the links below. I have organized the pdf files by decade and saved them into zipped files. If you download the zip files, you should be able to find most of the studies that you are looking for. I strongly recommend using and citing these studies in your own dissertation.

<b>PIMRS Studies 1980s</b>	<a href="#"><u>Download</u></a>
<b>PIMRS Studies 1990s</b>	<a href="#"><u>Download</u></a>
<b>PIMRS Studies 2000s</b>	<a href="#"><u>Download</u></a>
<b>PIMRS Studies 2010s</b>	<a href="#"><u>Download</u></a>
<b>PIMRS Studies 2013-15</b>	<a href="#"><u>Download</u></a>

### ABOUT THE AUTHOR

Professor Dr. Philip Hallinger, author of the *Principal Instructional Management Rating Scale* (PIMRS), received his doctorate in Administration and Policy Analysis from Stanford University. He has worked as a teacher, administrator, and professor and as the director of several leadership development centers. He has been a consultant to education and healthcare organizations throughout the United States, Canada, Asia, and Australia.

The *PIMRS* was developed with the cooperation of the Milpitas (California) Unified School District, Richard P. Mesa, Superintendent. As a research instrument, it meets professional standards of reliability and validity and has been used in over 200 studies of principal leadership in the United States, Canada, Australia, Europe, and Asia.

The scale is also used by school districts for evaluation and professional development purposes. It surpasses legal standards for use as a personnel evaluation instrument and has been recommended by researchers interested in professional development and district improvement (see, for example, Edwin Bridges, *Managing the Incompetent Teacher*, ERIC, 1984). Articles on the development and use of the *PIMRS* have appeared in *The Elementary School Journal*, *Administrators Notebook*, *NASSP Bulletin*, and *Educational Leadership*.

The *PIMRS* is copyrighted and may not be reproduced without the written permission of the author. Additional information on the development of the *PIMRS* and the rights to its use may be obtained from the publisher (see cover page).

### **Appendix E: Reflection Questions/Prompts**

1. What year did you transition? Was your transition voluntary, or requested by the district?
2. Please describe the setting of your transition. Was your transition from elementary to high school, or high school to elementary school? Was it in an urban, suburban, rural, Catholic, charter, or district school? Did you remain in a similar environment post-transition? Did you remain in the same district area?
3. How would you describe your leadership style in general?
4. Describe your transition from one setting to the next. Think specifically about your experiences and adjustments you made or are making, considering what factors made it easier or more difficult to transition levels (i.e., personal qualities/traits, leadership style, district support/PD, school staff).
5. Instructionally, after your transition, how would you describe your leadership? In what ways is leadership at your new level more or less challenging than the previous level?
6. What did you need, or wish you had, during or after your transition from one setting to the next?
7. Considering the PIMRS and the identified themes, to which theme did you connect the most? Please explain.



8. What advice or feedback would you give to a leader experiencing this transition, or to district-level leaders who support leadership assignments?

## Appendix F: Raw Data Table

	Participants (Pseudonyms)									
	"Abby"	"Bonnie"	"Carl"	"Daisy"	"Ernie"	"Felix"	"Gabby"	"Hannah"	"Isabel"	"Jenny"
Gender	Female	Female	Male	Female	Male	Male	Female	Female	Female	Female
Ethnicity	Caucasian	Caucasian	Black	Asian	Caucasian	Hispanic	Black	Caucasian	Caucasian	Caucasian
Age	31-40	41-50	41-50	31-40	51-60	31-40	51-60	41-50	31-40	41-50
Transition Direction	ES to HS	ES to HS	ES to HS	HS to ES	ES to HS	ES to HS	HS to ES	ES to HS	ES to HS	HS to ES
Transition Year	2017	2017	2018	2017	2017	2017	2018	2018	2017	2019
Voluntary/Requested by District	Voluntary	Request	Voluntary	Voluntary	Request	Voluntary	Voluntary	Voluntary	Voluntary	Voluntary
Same/Different District?	Same	Same	Different	Different	Same	Same	Different	Same	Same	Same
District Code	1	1	5	2	1	1	3	3	4	4
Years Leading Current School	1	2-4	2-4	2-4	+15	2-4	2-4	2-4	2-4	1
Total Years as Principal	2-4	5-9	2-4	5-9	2-4	2-4	+15	10-15	2-4	1
<b>PIMRS: Frame School Goals (avg)</b>	<b>4.5</b>	<b>4.25</b>	<b>5</b>	<b>4</b>	<b>3.75</b>	<b>4.5</b>	<b>5</b>	<b>4.75</b>	<b>4</b>	<b>4.75</b>
1. annual goals	4	5	5	4	4	4	5	4	4	4
2. staff responsibilities	4	5	5	4	4	5	5	4	4	5
3. needs assessment/staff input	4	4	5	4	3	4	5	5	4	4
4. use student data	5	3	5	4	4	4	5	5	4	5
5. easily understood	5	5	5	4	4	5	5	5	4	5
<b>PIMRS: Communicate School Goals (avg)</b>	<b>4.6</b>	<b>3.8</b>	<b>4.4</b>	<b>4</b>	<b>4.2</b>	<b>4.6</b>	<b>4.8</b>	<b>4.8</b>	<b>4.4</b>	<b>4.6</b>
6. communicate mission	5	3	4	3	4	4	4	4	4	4
7. discuss goals at faculty mtgs	5	4	4	4	4	4	5	5	4	4
8. refer to goals in curricular decisions	4	4	4	4	4	5	5	5	4	5
9. goals in visible displays	5	4	5	5	5	5	5	5	5	5
10. goals used in student forums	4	4	5	4	4	5	5	5	5	5
<b>PIMRS: Supervise &amp; Evaluate Instruction (avg)</b>	<b>4</b>	<b>3.4</b>	<b>3.4</b>	<b>3.4</b>	<b>3.6</b>	<b>4</b>	<b>4.4</b>	<b>4.4</b>	<b>3.4</b>	<b>3.8</b>
11. classroom priorities consistent with goals	5	4	4	4	4	4	5	5	4	5
12. review student work products	4	3	3	3	3	4	4	4	3	4
13. conduct informal observations in classrooms	4	3	4	3	3	4	4	4	3	4
14. identifying strengths in post-obs feedback	4	4	4	4	4	4	5	5	4	4
15. identifying weaknesses in post-obs feedback	3	3	2	3	4	4	4	4	3	2
<b>PIMRS: Coordinate the Curriculum (avg)</b>	<b>4</b>	<b>3.8</b>	<b>4.4</b>	<b>3.8</b>	<b>4.2</b>	<b>4.2</b>	<b>4.4</b>	<b>4.8</b>	<b>4</b>	<b>4.4</b>
16. make clear who is coordinating the curric	5	4	5	4	5	4	4	5	4	5
17. results of testing for curricular decisions	3	3	5	4	4	4	4	4	4	4
18. monitor classroom curriculum for obj.	4	4	4	4	4	4	5	5	4	4
19. access overlap between obj and achievement	4	4	4	3	4	4	4	5	4	4
20. participate in reviewing curricular materials	4	4	4	4	4	5	5	5	4	5

<b>PIMRS: Monitor Student Progress (avg)</b>	<b>3.4</b>	<b>3.2</b>	<b>3.6</b>	<b>3.2</b>	<b>3.8</b>	<b>3</b>	<b>4</b>	<b>3.8</b>	<b>3.8</b>	<b>3.8</b>
21. meet with teachers to discuss stu progress	3	3	4	3	4	3	4	4	4	3
22. discuss perf results w/ staff for strengths/weaknesses	4	4	4	3	4	3	4	4	4	4
23. use tests and other measures to assess progress toward goals	4	4	4	4	4	3	4	4	4	4
24. inform teachers of performance results in writing	3	3	3	3	3	3	4	3	3	4
25. inform students of school's academic progress	3	2	3	3	4	3	4	4	4	4
<b>PIMRS: Protect Instructional Time (avg)</b>	<b>3.8</b>	<b>3</b>	<b>3.8</b>	<b>3.4</b>	<b>3.4</b>	<b>3.4</b>	<b>3.2</b>	<b>4</b>	<b>4.2</b>	<b>3.2</b>
26. limit interruption of instructional time by PA	4	3	3	3	3	4	4	5	5	3
27. Ensure students are not called to office during instruct time	3	3	3	3	4	3	3	4	4	3
28. tardy and truant students have consequences for missing	4	2	4	3	3	3	2	2	4	3
29. encourage teachers to use inst time for teaching new skills	4	4	4	4	4	4	4	4	4	4
30. limit the intrusion of extra and co curr act on inst time	4	3	5	4	3	3	3	5	4	3
<b>PIMRS: Maintain High Visibility (avg)</b>	<b>3.2</b>	<b>3</b>	<b>3.4</b>	<b>3</b>	<b>3.8</b>	<b>3</b>	<b>3.6</b>	<b>4</b>	<b>3.2</b>	<b>4.2</b>
31. time to talk informally w/ students and teachers @ recess	4	4	4	4	5	4	4	5	4	5
32. visit classrooms to discuss school issues with teachers/stu	3	3	4	3	4	3	3	4	4	4
33. attend/participate in extra/co curricular activities	4	3	3	3	4	3	4	4	4	5
34. cover classes for teachers until a late or sub arrives	3	3	3	3	3	3	4	4	2	4
35. tutor students or provide direct instruction to classes	2	2	3	2	3	2	3	3	2	3
<b>PIMRS: Provide Incentives for Teachers (avg)</b>	<b>4</b>	<b>3.4</b>	<b>4.2</b>	<b>3.2</b>	<b>4.2</b>	<b>3.2</b>	<b>4</b>	<b>4.4</b>	<b>4.2</b>	<b>4.6</b>
36. reinforce superior performance via meetings/memos	4	4	4	4	4	3	4	5	4	5
37. compliment teachers privately for their performance/effort	5	4	5	3	5	4	4	5	5	5
38. acknowledge teachers' performance by writing memos	3	3	4	3	4	3	4	4	4	5
39. reward special efforts by teachers w/ opps for proff recog	4	3	4	3	4	3	4	4	4	4
40. create pd opps for teachers as a reward	4	3	4	3	4	3	4	4	4	4
<b>PIMRS: Promote Professional Development (avg)</b>	<b>3.8</b>	<b>3.4</b>	<b>4.2</b>	<b>3.4</b>	<b>3.4</b>	<b>3.8</b>	<b>4.4</b>	<b>4.2</b>	<b>4.2</b>	<b>4.8</b>
41. ensure that pd activities are aligned w/ school goals	4	3	4	4	3	4	5	4	4	5
42. support the use in the classroom of skills and pd	4	4	4	4	4	4	5	4	4	5
43. get participation of school staff in pd activities	3	3	4	3	3	4	4	4	4	4
44. lead or attend teacher pd regarding instruction	4	4	5	3	3	3	4	4	4	5
45. make time during meetings for teachers to share pd ideas	4	3	4	3	4	4	4	5	5	5
<b>PIMRS: Provide Incentives for Learning (avg)</b>	<b>4.2</b>	<b>3.6</b>	<b>3.4</b>	<b>3.6</b>	<b>4</b>	<b>3.6</b>	<b>4</b>	<b>4</b>	<b>3.8</b>	<b>4.6</b>
46. recognize students who do superior work with rewards	5	5	4	4	4	4	5	5	4	5
47. use assemblies to honor students for academics and behavior	5	4	4	4	4	4	4	4	4	5
48. recognize students in the office for their work	4	3	3	3	4	3	4	3	3	4
49. contact parents to share good performance and contribution	3	3	3	3	4	3	3	3	3	4
50. support teachers in their recognition of students in class	4	3	3	4	4	4	4	5	5	5

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