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Teaching and Learning Teams as an Implementation Architecture for System Improvement: A PLC+ Case Study

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ABSTRACT

This single-district case study reports a program evaluation of Spartanburg School District Two's Teaching and Learning Teams (TLTs), aligned locally to the PLC+ framework, as the implementation architecture used to organize, scale, and sustain instructional improvement across schools. Using a convergent mixed-evidence approach, the evaluation integrated semi-structured interviews with district and school personnel ($n = 18$), a districtwide educator survey ($n = 487$) including paired retrospective items, a key informant interview ($n = 1$), and aggregated student achievement indicators reviewed descriptively across the implementation period. Interview findings documented consistent TLT routines anchored in standards unpacking, shared learning intention and success criteria language, and recurring cycles of formative evidence review tied to instructional response. Survey results reflected substantial before-to-current shifts in core clarity routines and broad agreement that instructional planning, student learning, and engagement improved. Educators also described changes in student learning behaviors, including increased articulation of learning goals, more criteria-anchored feedback interactions, and stronger progress monitoring. District outcome indicators are presented as descriptive evidence aligned with the implementation period. The case illustrates how an implementation architecture can organize instructional work, stabilize expectations, and enable sustained improvement across a complex, multi-initiative district context.

Keywords: professional learning communities; PLC+; implementation architecture; system improvement; instructional leadership; program evaluation; teacher clarity

Efforts to improve instructional quality at scale often falter—not because districts lack effective practices, but because they lack durable implementation structures. Professional learning communities (PLCs) were developed to address fragmented instructional practice by organizing educators around shared responsibility for student learning and collaborative inquiry (DuFour et al., 2010; Hord, 1997). Yet collaborative time alone does not guarantee coherence. Without disciplined routines that clarify intended learning, establish shared evidence of mastery, and require instructional response, collaboration can drift toward coordination rather than realizing intended improvement.

Teacher clarity, defined through the articulation of learning intentions and success criteria and reinforced through formative evidence cycles, has been consistently linked to stronger student outcomes (Fisher et al., 2018; Hattie, 2023). In practice, however, clarity does not scale automatically. Even when educators understand the concepts, the challenge is translating clarity into routine planning, common evidence use, and consistent student-facing language across classrooms and schools. Such challenges are not theoretical. Often, what we describe is, at its foundation, an implementation problem. As Marshall (2023) argues, increasing professional knowledge proves insufficient without predictable application; initiatives succeed when leaders align intended outcomes with the structures, supports, systems, and expectations required to turn learning into action.

This program evaluation investigates both the implementation and the impact of a PLC-focused district-wide initiative. It examines South Carolina Spartanburg School District Two's Teaching and Learning Teams (TLTs), aligned locally to the PLC+ framework, as the district's primary collaborative implementation structure for scaling an early instructional focus on teacher clarity. PLC+ extends traditional PLC work by emphasizing disciplined cycles of collaborative planning and response, centering shared learning expectations, common evidence of student learning, and explicit instructional action within team routines (Fisher & Frey, 2025). In this formulation, collaboration is not an end in itself; it is the vehicle through which teams clarify learning, interpret evidence, and determine instructional response. In Spartanburg, that vehicle was enacted through TLTs as the standing structure for instructional decision-making across school contexts. The contribution of this case is *not* primarily the identification of a single effective instructional practice; rather, it is the documentation of how a district designed and sustained an implementation architecture that made instructional improvement routines predictable, repeatable, and scalable across contexts.

The evaluation benefits from educator-participant survey results, semi-structured interviews, and descriptive student outcome evidence to address the following five evaluation questions:

- (1) How have educators implemented TLTs/PLC+ focused on teacher clarity?
- (2) How did instructional planning and classroom practice shift during implementation?
- (3) How did enactment vary across teams and contexts?
- (4) What changes were observed in student learning and achievement?
- (5) What supports sustained or expanded the initiative across sites?

The study further contributes by documenting implementation routines and associated outcome patterns over time, while recognizing that district improvement occurs in complex environments shaped by multiple concurrent initiatives (Fixsen et al., 2005; Fullan, 2016). In this sense, the case contributes to the literature on scale and coherence by illustrating how an implementation architecture, rather than any single initiative, can organize instructional work, stabilize expectations, and enable sustained improvement over time.

CONCEPTUAL FRAMING

PLCs were developed to address fragmentation in instructional practice by organizing educators around shared responsibility for student learning and collaborative inquiry (DuFour et al., 2010; Hord, 1997). At their strongest, PLCs shift responsibility for learning from isolated classrooms to collaborative teams that clarify expectations, interpret evidence, and coordinate instructional response. However, collaboration alone does not ensure coherence. Without disciplined routines for defining learning, establishing shared evidence, and determining response, collaboration can remain procedural rather than instructional (Durlak & DuPre, 2008; Fixsen et al., 2005; Fullan, 2016). Collaboration becomes improvement when routines make evidence use and instructional response predictable.

PLC+ as a Content-Agnostic Improvement Vehicle

PLC+ extends PLC practice by making the improvement cycle explicit and disciplined. Fisher and Frey (2025) describe PLC+ as structured around five guiding questions: Where are we going? Where are we now? How do we move learning forward? What did we learn today? Who benefited and did not benefit? These questions organize collaborative inquiry into recurring cycles in which teams clarify goals, analyze evidence, implement instructional responses, and learn from results over time.

A key feature of PLC+ is that it is agnostic to instructional content. It defines how teams engage in inquiry, evidence use, and response, but not what specific instructional priorities must be adopted. As such, PLC+ can carry different improvement aims depending on local context. In this case, the district enacted PLC+ through the use of TLTs to support an early instructional focus on teacher clarity. PLC+ provided the process, teacher clarity provided the instructional emphasis, and TLTs functioned as the structure that made the work routine and visible across schools.

Clarity as an Instructional Anchor Within the PLC+ Cycle

Teacher clarity has been consistently associated with positive student outcomes. In the Visible Learning MetaX (2026) synthesis, an online evidence repository that continuously synthesizes and updates findings from educational meta-analyses, teacher clarity has a weighted mean effect size of 0.85 (101 studies; 14,853 students; 239 effects). Hattie (2023) similarly identifies clarity as a high-impact influence on achievement, emphasizing the importance of clear learning expectations and

criteria for success. Fisher et al. (2018) operationalize clarity through learning intentions, success criteria, and formative feedback cycles.

Within PLC+ routines, clarity strengthens each phase of the inquiry cycle. It sharpens goal-setting by requiring teams to translate standards into explicit learning intentions and criteria for success. It improves evidence interpretation because student work is evaluated against shared criteria. It increases the precision of instructional response by linking evidence directly to agreed expectations. In this way, teacher clarity functions both as classroom practice and as a tool that improves the quality of collaborative decision-making.

Clarity practices, however, do not scale automatically. Without shared expectations and opportunities for calibration, teachers may use learning intentions, criteria, and formative evidence inconsistently. As Marshall (2023) argues, improvement depends not only on knowledge but on predictable application; initiatives succeed when learning is embedded in routines that support consistent enactment. When clarity is integrated within recurring PLC+ cycles, it becomes less dependent on individual variation and more likely to appear as shared practice across teams.

Initiatives, Programs, and Implementation Architecture

A central distinction in this study is between programs and initiatives. Programs typically refer to discrete interventions or resources, whereas initiatives encompass the design, implementation, and refinement processes required to translate ideas into sustained practice (Marshall, 2023). Research on implementation and improvement consistently shows that durable change depends on alignment between intended outcomes, organizational routines, and instructional practice, not simply adoption of effective programs (Durlak & DuPre, 2008; Fixsen et al., 2005; Fullan, 2016).

This distinction is particularly important in district-scale reform. When improvement efforts are treated as discrete events—such as professional development sessions or curriculum adoptions—they are often layered onto existing practice without structural integration. Even well-regarded programs can yield limited results when implementation is not supported; without alignment, initiatives may compete for attention or fragment instructional practice (Marshall, 2004). Research on scale and coherence emphasizes that sustained improvement depends on the routines and conditions that stabilize practice across contexts (Coburn, 2003; Datnow & Park, 2014). Improvement science similarly highlights the role of disciplined cycles of inquiry supported by enabling systems and norms (Bryk et al., 2015).

From this perspective, an implementation architecture refers to the routines, tools, roles, and feedback loops that make instructional work repeatable, improvable, and coherent over time (Elmore, 2004; Honig, 2006; Penuel et al., 2011). In this case, TLTs—aligned with PLC+—functioned as that architecture. The district embedded clarity routines, including standards unpacking, learning intentions, success criteria, formative evidence review, and instructional response, within recurring collaborative cycles. Rather than treating PLC+ or teacher clarity as isolated interventions, this study examines how a structured collaborative framework organized instructional work over time and how patterns of practice and outcomes aligned with that structure.

METHODS

This study was designed as a process-focused program evaluation with outcome evaluation components and is presented as a descriptive single-district case study (Yin, 2018). The evaluation examined Spartanburg School District Two's TLT initiative, aligned locally to the PLC+ framework, to understand how the district's collaborative implementation architecture was enacted, how teacher clarity practices developed within that structure, and how instructional practices and district outcome indicators evolved over multiple years. Consistent with program evaluation approaches, the study emphasizes implementation processes and associated outcomes rather than causal attribution, and, therefore, it is not intended as an impact evaluation (Fitzpatrick et al., 2011).

The evaluation plan was screened by San Diego State University's Institutional Review Board and determined to be not subject to IRB review (IRB-25-0372; determination issued August 28, 2025). Regardless, data handling and reporting procedures followed applicable privacy regulations and professional ethical standards, including reporting in aggregate form and maintaining confidentiality of interview participants.

District and Program Context

Spartanburg School District Two implemented TLTs as its primary collaborative instructional structure across schools. TLTs operationalized the PLC+ improvement cycle through recurring routines in which teams (a) clarified intended learning by unpacking standards, (b) defined success criteria, (c) reviewed common formative evidence aligned to those expectations,

and (d) determined instructional response based on patterns in student performance (Fisher et al., 2019a). Teacher clarity was introduced as an early instructional priority within this cycle, emphasizing learning intentions, success criteria, and alignment of formative assessment to those criteria (Hattie, 2023; Fisher et al., 2018). Over time, the initiative deepened to include stronger calibration of expectations and evidence, greater coherence across classrooms and grade levels, and more precise instructional language for planning and interpreting student work.

The initiative evolved across multiple years with identifiable phases of emphasis while maintaining TLTs as the primary implementation architecture rather than layering parallel structures. Table 1 presents the year-by-year implementation by summarizing professional learning phases, system supports, and major implementation milestones.

Table 1

Initiative Implementation: Summary of Milestones by Year

Time Period	Primary Focus	Milestones and Examples
2018–2020	Building PLC/TLT fidelity and protocols	<ul style="list-style-type: none"> • Visible Learning conference attendance (2018) • Leading Impact Teams training and pilot work • Learning by Doing focus for TLT reset
2020–2022	Clarity during pandemic context	<ul style="list-style-type: none"> • Distance Learning Playbook distributed • Monthly Tier I PD cascade • Continued Core Collaborative support • Reported statewide rank improvements in Grades 3–8 ELA/Math from 2020–21 to 2021–22
2022–2024	Deepening Teacher Clarity and leadership learning	<ul style="list-style-type: none"> • Teacher Clarity certification (Sept 2022, 40 participants) • Institutes on Teacher Clarity Playbook and Success Criteria Playbook • PLC+ institute for secondary • Success Criteria certification (Dec 2023) • Teacher Clarity Playbook as system text (2023–24) • System walkthroughs (Jan 2024) • Curriculum guide integration (May 2024)
2024–2025	Expansion to scaffolding/GRR while sustaining clarity routines	<ul style="list-style-type: none"> • How Scaffolding Works as Tier I system text • Onsite GRR training (Sept & Oct 2024) • Teacher Clarity institute (Jan 2025) • Student assessment workshop (Mar 2025).

Data Sources

The evaluation integrates four sources of evidence: semi-structured interviews, districtwide survey data, aggregated student performance indicators, and a key informant interview used to contextualize the implementation timeline and program description.

Interviews

Between December 2025 and January 2026, semi-structured interviews were conducted with 18 individuals directly engaged in TLT implementation: four principals, one assistant principal, eight instructional coaches (including English/Language Arts and mathematics), and five classroom teachers—across elementary, middle, and high school contexts. Purposive selection was used to capture role-based and school-level variation, including schools identified by the district as having greater experience with TLTs and related professional learning. Protocols were aligned to the five

evaluation questions and elicited descriptions of planning routines, formative evidence use, collaborative dynamics, instructional shifts, student learning behaviors, and sustaining conditions.

To provide district-level context, a semi-structured key informant interview was also conducted with the district administrator responsible for leading TLT implementation. The interview followed the same evaluation framework and explored the development of the initiative, implementation decisions, leadership supports, challenges, and sustainability. The interview was audio-recorded, professionally transcribed, and analyzed using the same deductive coding procedures as the school-based interviews.

Survey

A districtwide educator survey was administered from December 15, 2025, to January 5, 2026 ($n = 487$). Items assessed instructional planning, clarity-related practices, student learning and engagement, collaboration, and district supports, with open-ended prompts on perceived drivers and challenges. The only respondent descriptors available were school site and tenure in TLTs; responses reflected participation across district schools and across multiple stages of implementation.

Student performance evidence

Student performance evidence consisted of aggregated district-level assessment indicators and other district-available outcome trends reviewed across the implementation period. These indicators were interpreted descriptively to contextualize reported instructional shifts and educator descriptions of student learning changes.

Data Analysis

Analysis proceeded deductively and was organized around the five evaluation questions. Interview analysis used an a priori coding structure aligned to the question areas (implementation, instructional shifts, variation, student learning and achievement, and sustaining conditions). Within each area, transcripts were coded for recurring routines, mechanisms, and participant descriptions (e.g., standards unpacking, success criteria, evidence review, response planning, calibration, protected time, coaching). As recommended by Miles et al. (2019), analytic memos and iterative comparison of coded excerpts were used to refine code definitions, collapse related codes into broader themes, and verify that themes reflected patterns evident across participants rather than isolated comments. Themes were retained when they represented coherent patterns across interviews and were supported by multiple participants, while discrepant perspectives were preserved where they added explanatory nuance.

To clarify scope and avoid overstating convergence, theme frequencies were calculated conservatively: a theme was counted only when explicitly referenced by an interviewee and counted once per interviewee regardless of repetition within the transcript. Frequencies were examined across roles and school levels to describe patterns of consistency and variation.

Survey analysis was descriptive and aligned to the same evaluation question areas. Likert items were summarized using distributions. Pre-initiative and current response distributions were compared using McNemar's test for paired dichotomous responses following recoding of Likert-scale responses into agree/strongly agree versus all other categories (strongly disagree, disagree, neither agree nor disagree). Open-ended responses were coded thematically and compared to interview themes to identify convergence and divergence across methods.

Survey items were analyzed across multiple evaluation questions when they provided evidence relevant to more than one construct (e.g., implementation, instructional shift, and student-facing enactment). As a result, some items appear in multiple tables; these are not treated as independent measures but as indicators of overlapping dimensions of practice within the implementation architecture. Items related to success criteria appear most frequently, reflecting both their central role within the teacher clarity framework and their prominence as the primary instructional focus of the TLT initiative. Because success criteria shape planning, evidence interpretation, feedback, and student engagement, their recurrence across tables reflects their integrative role within the implementation architecture rather than a single isolated construct.

Finally, evidence was triangulated across interviews, survey patterns, and student performance indicators. Interviews were used to describe mechanisms and contextual nuance, survey findings to assess breadth, and student performance indicators to provide descriptive outcome context during the implementation period.

Trustworthiness

Trustworthiness was supported through multiple strategies consistent with qualitative case study and program evaluation research (Lincoln & Guba, 1985). Credibility was strengthened through triangulation of interview, survey,

district outcome, and key informant data, allowing findings to be examined across multiple sources. Transferability was supported through detailed description of the district context, participants, implementation processes, and collaborative structures, enabling readers to judge the applicability of findings to similar settings. Dependability was enhanced through standardized interview protocols aligned to the evaluation questions, consistent deductive coding procedures, analytic memos documenting coding decisions, and conservative rules for counting theme frequencies. Confirmability was supported by grounding interpretations in participant quotations, triangulating findings across data sources, and preserving discrepant perspectives where they contributed to understanding variation in implementation.

FINDINGS

Findings are organized around the five evaluation questions. Across these questions, results are interpreted through the lens of TLTs as an implementation architecture, with attention to how routines, roles, and expectations organized instructional work and influenced patterns of enactment across contexts.

Evaluation Question 1: How Have Educators Implemented TLTs/PLC+ Aligned with Teacher Clarity?

Interview and survey evidence describe TLTs as the district's primary implementation structure for teacher clarity. Interviewees most consistently described a standards-first planning routine supported by shared clarity language and recurring evidence-to-response cycles. Table 2 presents a summary of survey findings aligned with supporting interview themes and interviewee statements.

Interviewees most frequently described standards-first planning, supported by shared clarity language and recurring evidence-to-response cycles. Nearly all interviewees referenced unpacking standards as the starting point for planning (94%, 17/18), often described as identifying "nouns and verbs," and most referenced structured review of formative evidence in TLT meetings (89%, 16/18), including bringing back evidence and being pressed to specify "what we did for each group." Survey paired items align with these descriptions through large retrospective shifts in standards analysis, learning intentions and success criteria routines, assessment alignment, embedded formative checks, and evidence-based instructional adjustment.

Interviewees also described implementation as a deliberate effort to standardize instructional language and expectations. A majority referenced vocabulary alignment around "learning intentions" and "success criteria" (61%, 11/18), including returning to prior targets to "clean up" language so it was student-friendly and skill-aligned. Variation was acknowledged as well: two-thirds of interviewees referenced differences in team engagement or meeting dynamics (67%, 12/18), contrasting meetings that functioned as a "checkbox" with teams where members "share that responsibility" for interpreting evidence and determining response. Survey indicators tied to classroom transfer and student-facing enactment provide a parallel cue that some routines are harder to enact consistently than others, even when planning routines are well established.

Evaluation Question 2: How Did Instructional Planning and Classroom Practice Shift During Implementation?

Interview and survey evidence describe meaningful shifts in instructional planning and classroom practice during implementation. At the global level, 85% of survey respondents agreed or strongly agreed that instructional planning improved, and 78% agreed or strongly agreed that student learning and engagement improved. Table 3 presents a summary of survey findings aligned with supporting interview themes and interviewee statements.

Interviewees most frequently described planning shifts as changes in sequence and specificity: moving from activity-first planning toward defining learning and success first, then selecting tasks and evidence accordingly. A large majority described increased clarity about what students were expected to learn and what would count as evidence of mastery (89%, 16/18), and interviewees described this shift as more than a change in wording. One principal described the difference as selecting tasks that "exhibit that success criteria," reflecting a change in the logic of lesson design rather than an add-on requirement. Interviewees also described formative practice becoming more central to instructional response, including "bring[ing] back that data" and pressing toward next steps, with leaders emphasizing that evidence review was incomplete without clarity about "what we did for each group." Survey paired items align with these descriptions through large retrospective shifts in student-facing clarity routines (e.g., revisiting learning intentions and using success criteria to guide feedback and self-assessment) and in evidence-based practices (e.g., embedded formative checks, assessment alignment, and real-time instructional adjustment).

Table 2

Implementation of TLTs/PLC+ aligned with Teacher Clarity

Survey-reported Changes in Practice: Percentage Selecting “Agree” and “Strongly Agree” (<i>n</i> = 487)	Interview Mentions (<i>n</i> = 18)	Key Interview Findings
<i>Standards unpacking as planning anchor</i>		
I analyze standards to separate the key concepts (nouns) from the skills (verbs): 30.0% to 89.6% (Δ = +59.6%), $\chi^2(1)$ = 260.03, <i>p</i> < .001	94% (17/18)	Interviewees described standards-first planning, often framed as identifying “nouns and verbs,” before drafting learning intentions and success criteria. “[A]lways start with looking at the standard, unpacking the standard... what are the nouns, what are the verbs, what’s our outcome looking like.” “[C]hoose what students are doing that exhibits that success criteria.”
<i>Formative evidence review in TLTs and evidence-to-response</i>		
I align assessments directly to learning intentions and success criteria: 44.7% to 95.1% (Δ = +50.3%), $\chi^2(1)$ = 215.04, <i>p</i> < .001 I embed formative checks for understanding throughout lessons: 46.0% to 91.1% (Δ = +45.1%), $\chi^2(1)$ = 191.05, <i>p</i> < .001	89% (16/18)	Interviewees emphasized bringing student evidence into TLTs, identifying patterns, and moving beyond interpretation to explicit instructional response (e.g., “what we did for each group”). “[B]ring back that data and say, ‘Okay, where are these kids? Where are gaps? What do we do to move forward?’”
<i>Shared clarity language and vocabulary alignment</i>		
I write daily learning intentions that focus on what students will learn (not just what they will do): 30.2% to 88.6% (Δ = +58.4%), $\chi^2(1)$ = 245.45, <i>p</i> < .001 I share and discuss success criteria with students early in the lesson: 24.7% to 81.2% (Δ = +56.5%), $\chi^2(1)$ = 238.10, <i>p</i> < .001 I present learning intentions in student-friendly language: 33.4% to 91.8% (Δ = +58.4%), $\chi^2(1)$ = 253.04, <i>p</i> < .001 I revisit learning intentions throughout the lesson to reinforce purpose: 22.0% to 76.2% (Δ = +54.2%), $\chi^2(1)$ = 229.04, <i>p</i> < .001	61% (11/18)	Interviewees described standardizing language (learning intentions, success criteria) and “cleaning up” prior phrasing to be student-accessible and skill-aligned.
<i>Variation in depth of enactment</i>		
I use success criteria to guide feedback and student self-assessment: 22.6% to 75.6% (Δ = +53.0%), $\chi^2(1)$ = 226.04, <i>p</i> < .001	67% (12/18)	Variation was described as differences in depth of inquiry (from “checkbox” meetings to “shared responsibility”), rather than the absence of routines.

Interviewees also described shifts in classroom discourse and feedback practices that extended clarity from planning into instruction. A majority referenced students increasingly articulating what they were learning (78%, 14/18), and over half referenced feedback becoming more criteria-based and specific (56%, 10/18), consistent with survey patterns showing

growth in routines that make success criteria usable during instruction. At the same time, half of interviewees referenced continued work helping students connect learning to purpose (50%, 9/18), suggesting that clearer targets and criteria strengthened alignment and monitoring while leaving room for ongoing attention to meaning-making.

Table 3

Instructional Planning and Classroom Practice Shifts

Survey-reported Changes in Practice: Percentage Selecting “Agree” and “Strongly Agree” (<i>n</i> = 487)	Interview Mentions (<i>n</i> = 18)	Key Interview Findings
<i>Planning precision and task alignment to success criteria</i>		
I determine the type of knowledge (declarative/procedural) required by the standard: 23.7% to 75.0% (Δ = +51.3%), $\chi^2(1)$ = 220.00, p < .001	89% (16/18)	Interviewees described a shift from activity-first planning to defining success first; one principal described selecting tasks that “exhibit that success criteria.” “[C]hoose what students are doing that exhibits that success criteria,” with the realization “there’s an intentionality that comes from that.”
I identify the cognitive complexity required by the standard and plan accordingly: 33.0% to 85.5% (Δ = +52.5%), $\chi^2(1)$ = 221.20, p < .001		
<i>Formative checks and instructional adjustment</i>		
I align assessments directly to learning intentions and success criteria: 44.7% to 95.1% (Δ = +50.3%), $\chi^2(1)$ = 215.04, p < .001	89% (16/18)	Interviewees described planning for evidence, returning to results in team time, and adjusting instruction; coaches referenced “bring[ing] back that data” to decide next steps. “[We] bring back that data and say, ‘Okay, where are these kids? Where are gaps? What do we do to move forward?’”
I embed formative checks for understanding throughout lessons: 46.0% to 91.1% (Δ = +45.1%), $\chi^2(1)$ = 191.05, p < .001		
<i>Student-facing clarity: articulation, feedback, self-monitoring</i>		
I design multi-step progressions that logically build student understanding: 40.5% to 92.9% (Δ = +52.4%), $\chi^2(1)$ = 225.00, p < .001	78% (14/18)	Interviewees described students more often naming learning targets and using criteria language during feedback and revisions. Previously, “we would just teach and you would just hope... that they got it.”
I share and discuss success criteria with students early in the lesson: 24.7% to 81.2% (Δ = +56.5%), $\chi^2(1)$ = 238.10, p < .001		
I use success criteria to guide feedback and student self-assessment: 22.6% to 75.6% (Δ = +53.0%), $\chi^2(1)$ = 226.04, p < .001		
<i>Boundary condition: relevance/purpose</i>		
I revisit learning intentions throughout the lesson to reinforce purpose: 22.0% to 76.2% (Δ = +54.2%), $\chi^2(1)$ = 229.04, p < .001	50% (9/18)	Some interviewees noted continued work helping students connect learning targets to purpose and relevance, even as clarity routines strengthened. “Every 10 to 15 minutes we’re checking in...”

Evaluation Question 3: How Do Educator Descriptions of Impact Differ Based on Variation in Implementation Across Teams and Contexts?

Interview and survey evidence indicate that variation across teams was a consistent feature of districtwide implementation, even as overall perceptions of improvement were positive. Interviewees did not describe variation as a simple divide between “implementing” and “not implementing.” Instead, they described differences in depth of enactment: how responsibility was distributed within meetings and how consistently clarity routines carried through into classroom use. Two-thirds of interviewees referenced variation in meeting dynamics or shared responsibility (67%, 12/18), over half described differences in the instructional use of success criteria (56%, 10/18), and half referenced differences in student engagement with learning goals and criteria (50%, 9/18). Survey paired-item results provide a parallel signal that classroom transfer routines, while substantially improved, trailed the most established planning routines (Table 4).

Variation was most visible in descriptions of meeting dynamics and the quality of collaborative inquiry. Some teams were described as completing expected elements with limited collective analysis of evidence, characterizing the work as more procedural than instructional. One coach described teams still in “initial learning,” where the meeting functioned “more of a checkbox,” suggesting uneven participation or limited instructional dialogue even when structures were present. In contrast, other teams were described as ones in which members “share that responsibility” for unpacking standards, interpreting evidence, and determining response. These contrasts locate variation in how reliably teams moved from evidence review to explicit response planning, rather than in whether structures existed.

Interviewees also described variation in classroom enactment through the role success criteria played during instruction. In some accounts, criteria were visible and referenced in planning but less consistently used to drive feedback, self-assessment, or peer discussion. In other accounts, students were described as using criteria language to discuss work quality and next steps, indicating that clarity practices were operating as student-facing learning tools rather than only teacher planning tools. Interviewees further described context-specific translation work, including content areas that required additional time to define what the approach “looks like” in their discipline (28%, 5/18), alongside contexts where routines became more consistent within schools over time through shared tools, coaching, and administrative expectations (33%, 6/18).

Evaluation Question 4: In What Ways Have Student Learning Outcomes Shifted, Including Any Relationship Between Implementation and Student Learning Outcomes?

Student outcome evidence in this evaluation draws on educator observations of student learning behaviors alongside district achievement indicators reviewed across the implementation period. Interviewees described student learning shifts primarily in student-facing clarity behaviors, including students’ articulation of learning goals, criteria-anchored feedback interactions, and awareness of progress and next steps. Across interviews ($n = 18$), most interviewees referenced increased student articulation of what they were learning (78%, 14/18), over half referenced more criteria-anchored feedback interactions (56%, 10/18), and half referenced greater student awareness of progress and next steps (50%, 9/18). These patterns align with survey paired-item results showing substantial shifts in routines that make learning goals and success criteria usable for students during instruction (Table 5).

Survey evidence further supports these student-facing shifts at scale. In paired retrospective items, respondents reported substantial movement from before implementation to current practice in presenting learning intentions in student-friendly language, sharing and discussing success criteria early in lessons, using success criteria to guide feedback and student self-assessment, and involving students in reflecting on progress toward mastery. At the global level, 78% of respondents agreed or strongly agreed that student learning and engagement improved ($n = 487$). Interview accounts provide additional specificity, describing changes in how students talk about learning, interpret feedback, and monitor their own progress.

In addition to these reported changes in student learning behaviors, district-level achievement indicators provide a descriptive outcome context aligned with the implementation period. Interviewees frequently referenced improvements in state assessment performance, particularly in relation to grade-level outcomes in English language arts and mathematics and end-of-course (EOC) assessments at the high school level. To synthesize these patterns, Figure 1 presents a consolidated dashboard of multi-year achievement trends and current system performance indicators.

Table 4

Variation in Enactment Across Teams and Contexts

Survey-reported Changes in Practice: Percentage Selecting “Agree” and “Strongly Agree” (<i>n</i> = 487)	Interview Mentions (<i>n</i> = 18)	Key Interview Findings
<i>Depth of collaborative planning and shared responsibility</i>		
I use learning progressions to plan across multiple lessons: 35.2% to 87.7% (Δ = +52.5%), $\chi^2(1)$ = 222.04, <i>p</i> < .001	67% (12/18)	Interviewees contrasted procedural meetings (“checkbox”) with inquiry-driven meetings where members “share that responsibility” for evidence interpretation and response.
I connect learning progressions to prior knowledge and future learnings: 44.9% to 93.6% (Δ = +48.7%), $\chi^2(1)$ = 209.00, <i>p</i> < .001		
<i>Instructional use of success criteria beyond posting</i>		
I integrate language expectations into instruction and success criteria: 28.7% to 82.6% (Δ = +53.9%), $\chi^2(1)$ = 235.00, <i>p</i> < .001	56% (10/18)	Variation centered on whether success criteria operated as an active reference point for feedback, self-assessment, and peer discussion versus a planning artifact.
I use success criteria to guide feedback and student self-assessment: 22.6% to 75.6% (Δ = +53.0%), $\chi^2(1)$ = 226.04, <i>p</i> < .001		
<i>Student engagement with goals, criteria, and next steps</i>		
I present learning intentions in student-friendly language: 33.4% to 91.8% (Δ = +58.4%), $\chi^2(1)$ = 253.04, <i>p</i> < .001	50% (9/18)	Interviewees described differences in how consistently students articulated learning and used criteria to judge quality and identify next steps.
<i>Content-area translation and adaptation</i>		
No survey items	28% (5/18)	Interviewees described subject-specific translation work (e.g., social studies taking longer to define what the approach “looks like” and the practice of engaging in vertical alignment).
<i>Contexts of relative consistency within schools</i>		
No survey items	33% (6/18)	Some interviewees described strengthening coherence over time through shared tools, coaching, and administrative expectations.

Table 5

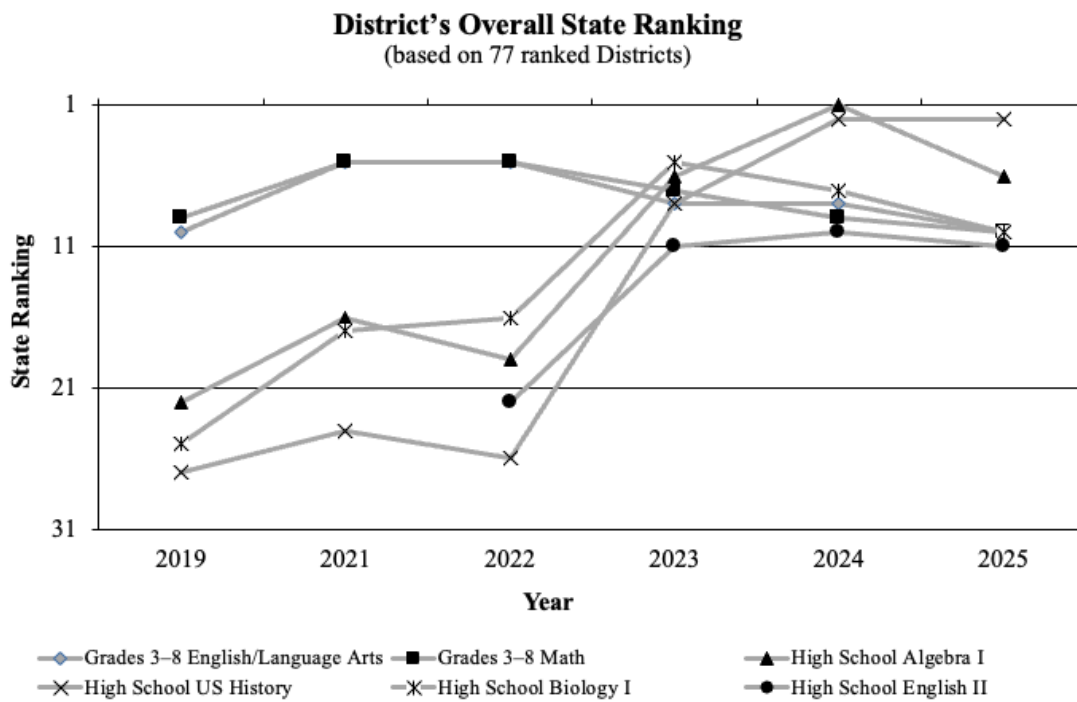
Student Learning Outcomes Referenced in Interviews (n = 18) and Aligned Survey Indicator (n = 487)

Survey-reported Changes in Practice: Percentage Selecting “Agree” and “Strongly Agree” (n = 487)	Interview Mentions (n = 18)	Key Interview Findings
<i>Student articulation of learning goals</i>		
I define mastery for priority standards using clear criteria: 39.3% to 93.4% ($\Delta = +54.1\%$), $\chi^2(1) = 231.10$, $p < .001$ I create clear, observable criteria for success aligned to standards: 32.1% to 91.2% ($\Delta = +59.1\%$), $\chi^2(1) = 252.00$, $p < .001$	78% (14/18)	Interviewees described students naming what they were learning more frequently when learning intentions and success criteria were consistently used and revisited: “[A]lways start with looking at the standard, unpacking the standard... what are the nouns, what are the verbs, what’s our outcome looking like.”
<i>Criteria-anchored feedback interactions</i>		
I share and discuss success criteria with students early in the lesson: 24.7% to 81.2% ($\Delta = +56.5\%$), $\chi^2(1) = 238.10$, $p < .001$ I integrate language expectations into instruction and success criteria: 28.7% to 82.6% ($\Delta = +53.9\%$), $\chi^2(1) = 235.00$, $p < .001$	56% (10/18)	Interviewees described feedback shifting from generic affirmation toward success-criteria language and clearer expectations for improvement.
<i>Progress monitoring and next steps</i>		
I use success criteria to guide feedback and student self-assessment: 22.6% to 75.6% ($\Delta = +53.0\%$), $\chi^2(1) = 226.04$, $p < .001$	50% (9/18)	Interviewees described students becoming more aware of what success looks like and what remains incomplete. They now “reflect back... to kind of rate themselves.”
<i>Achievement indicators referenced by interviewees</i>		
No survey items	67% (12/18)	Interviewees referenced gains in tested areas (see Figure 1).

Achievement trends reflect patterns that align with the phased implementation of TLTs and associated teacher clarity practices across grade spans. At the elementary and middle school levels (Grades 3–8), achievement rankings improved during the initial years of more consistent implementation, including the COVID and immediate post-COVID period, reaching top-five rankings in both English language arts and mathematics. Despite subsequent increases in student enrollment—approximately 2,000 additional students, primarily in Grades 3–8—these outcomes have remained within the top 10 in the state, indicating sustained performance under changing system conditions.

At the high school level, achievement trends reflect a later but pronounced improvement pattern. Prior to more consistent implementation of TLT-aligned practices, high school end-of-course outcomes were comparatively lower. Following expanded implementation beginning around 2022, student outcomes improved substantially across all four EOC subject areas. These gains include notable increases in algebra I and U.S. history performance, alongside broader improvements across English II and biology. These changes correspond to the 2022–2024 period, when implementation became more consistent at the high school level.

Together, these trends indicate that student outcomes became more aligned across grade spans as implementation became more coherent system-wide. Early strength at the elementary and middle school levels was followed by later convergence at the high school level, resulting in system-wide performance within the top 10 across major subject areas. The dashboard (Figure 1) further indicates that current performance across subjects exceeds expectations relative to comparable districts with similar poverty levels, reinforcing the overall pattern of improvement.

Figure 1***Student Achievement Trends and District Performance Dashboard*****District's 2024 State Ranking for Like Poverty Group**

Subject	State Ranking for Like Poverty Group	+/- Difference from Expected Outcome
Grades 3-8 English/Language Arts	2	+9.34%
Grades 3-8 Math	3	+10.63
High School Algebra I	1	+24.23
High School US History	1	+17.36
High School Biology I	3	+11.90
High School English II	2	+11.69

Contextual Factors:

- An additional 2,000+ students entered district between 2022–2025.
- COVID disruption impacted 2020–2022.
- Grade 3-8 implementation strengthened in 2021.
- The High School implementation expanded from 2022 to 2024.

Consistent with the overall design of this evaluation, these findings reflect aligned patterns rather than causal effects. Achievement trends occurred within a complex system characterized by multiple concurrent initiatives, including curriculum changes, targeted supports, and evolving professional learning priorities. Interviewees themselves emphasized this complexity, describing improvement as the result of coordinated efforts rather than any single intervention. Within that

context, TLTs—aligned with the PLC+ framework—are best understood as the implementation architecture that organized instructional work, supported consistent use of evidence, and enabled practices to be enacted and refined across schools over time.

Evaluation Question 5: What Supports or Adaptations Sustained or Expanded the Initiative Across Sites?

Interviewees described sustainability less as maintaining enthusiasm and more as maintaining structure. Four sustaining conditions surfaced consistently across interviews ($n = 18$): protected collaborative time, coaching support, leadership alignment around expectations, and pacing that allowed teams to refine routines over time. Protected TLT time was referenced in 89% of interviews (16/18), coaching support in 83% (15/18), leadership alignment in 72% (13/18), and gradual pacing or iterative refinement in 67% (12/18). Interviewees typically described these conditions as reinforcing: time enabled the work to occur predictably, coaching strengthened the quality of enactment, leadership stabilized expectations across years, and pacing created space for routines to deepen rather than reset.

Protected time was described as the practical prerequisite. Interviewees described collaborative time as intentionally guarded so planning and evidence review remained non-negotiable; one coach noted that without protected time, “It wouldn’t work.” Interviewees also described coaching as both a sustaining force and an adaptation mechanism, with coaches portrayed as facilitators and calibrators who supported success criteria quality, more consistent interpretation of student evidence, and clearer response planning tied to identified learning needs. These descriptions position coaching not as an add-on support but as part of the routine system that helps teams translate expectations into workable practice.

Leadership alignment and consistent messaging were also described as sustaining conditions. Interviewees described expectations as coherent over time while instructional emphasis deepened and expanded within a stable implementation architecture, with leaders reinforcing the work through walkthroughs, artifact review, and meeting participation. Pacing and iterative refinement were described as necessary for durable implementation, particularly early on as language was standardized and expectations for formative evidence were clarified; teams revisited language, adjusted protocols, and refined assessment and response practices over time. Table 6 summarizes these sustaining conditions and adaptations by aligning interview frequencies with the corresponding survey indicator of sustaining supports.

Table 6

Sustaining Conditions and Adaptations Referenced in Interviews (n = 18)

Area Investigated	Interview Mentions ($n = 18$)	Key Findings
Protected collaborative time	89% (16/18)	Interviewees described protected time as non-negotiable. One coach stated that without it, “it wouldn’t work.” “[I]f we didn’t protect that time, it wouldn’t work.”
Coaching support as sustaining and calibrating mechanism	83% (15/18)	Interviewees portrayed coaches as facilitators and calibrators who strengthened success criteria, evidence interpretation, and response planning.
Leadership alignment and consistent messaging	72% (13/18)	Interviewees described coherent expectations over time supported by walkthroughs, artifact review, and meeting participation.
Pacing and iterative refinement	67% (12/18)	Interviewees described gradual uptake and repeated cycles to refine language, protocols, and evidence expectations. It “guided us to make [the initiative] successful, instead of just saying... ‘here’s a new thing.’”

DISCUSSION

This district case study examined how TLTs, aligned locally to PLC+, functioned as the collaborative implementation vehicle through which an early instructional focus on teacher clarity was introduced, normalized, and refined across schools.

The findings document both implementation and impact. At the implementation level, interview and survey evidence converged on consistent routines centered on standards unpacking, shared language for learning intentions and success criteria, and recurring cycles of formative evidence review tied to instructional response (Table 2). At the impact level, educators described shifts in planning and classroom practice (Table 3), identified changes in student learning behaviors—including increased articulation of learning goals and more criteria-anchored feedback interactions (Table 5), and referenced improved student outcome patterns during the same period (Figure 1). In sum, the case illustrates how a disciplined collaborative structure can translate professional learning into predictable doing, a core requirement for durable improvement (Fixsen et al., 2005; Fullan, 2016; Marshall, 2023). More specifically, the findings suggest that what enabled this translation was not the presence of collaborative time alone, but the design and protection of an implementation architecture that made key instructional routines visible, expected, and improvable across schools. These findings are interpreted as aligned patterns rather than causal effects, reflecting the role of implementation architecture in organizing multiple concurrent improvement efforts.

A notable feature of the interview evidence was the disciplined way leaders and educators interpreted improvement trends. Interviewees did not default to single-initiative explanations. Instead, multiple interview participants explicitly described achievement gains and instructional shifts as occurring within a broader set of aligned efforts, including curriculum work, targeted supports, and other improvement strands active during the same period (Table 5, Figure 1). This stance strengthens the credibility of the case and sharpens its practical value for leaders. PLC+ (TLT) is best understood here not as “the” intervention credited for all growth, but as the stable improvement vehicle that organized adult learning and evidence-based response so that multiple priorities could be implemented coherently, monitored consistently, and refined over time (Tables 2-3, Figure 1). This distinction is central: the observed patterns of improvement are less attributable to any single instructional focus and more to the presence of an implementation architecture capable of carrying, integrating, and sustaining multiple priorities within a coherent system of work.

Lesson 1: Treat collaborative time as implementation architecture, not a meeting

One of the clearest lessons for system improvement is that collaboration becomes instructional improvement only when it is designed as an improvement cycle with a clear evidence-to-response turn. Across roles, interviewees described TLTs as effective when teams reliably moved from clarified learning expectations to shared analysis of evidence and then to explicit instructional response (Table 2). That pattern maps directly to the PLC+ investigation-cycle intent: teams clarify where they are going, determine where they are now, decide how to move learning forward, and learn from the results of those decisions (Fisher & Frey, 2025). Where those steps were enacted with discipline, collaboration functioned less as coordination and more as instructional decision-making (Tables 2–3). Where those steps were enacted procedurally, collaboration risked becoming compliance work.

For leaders, this shifts what is monitored. The key question is not whether teams meet, but whether team time produces the decisions that make instruction more coherent and responsive. In practical terms, the most consequential “look-for” in this case was whether meetings consistently yielded a response plan that matched the evidence, not simply a completed agenda. This is where the vehicle earns its value.

Lesson 2: Start with an instructional anchor that improves the quality of team decisions

Teacher clarity served as an effective early anchor because it strengthened the decision points inside the PLC+ cycle where teams often drift without shared definitions (Tables 2–3). In both interviews and survey results, educators described and reported large shifts in standards-based planning, student-friendly learning intentions, observable success criteria, embedded formative checks, and evidence-based adjustment. Interviews then explained how those changes altered the logic of planning: the sequence moved from activities-first toward standards and success criteria driving task selection and instructional response. This shift matters for leaders because it is not a surface adoption of vocabulary. It is a change in how planning decisions are justified and how evidence is interpreted.

The student-facing dimension of clarity also emerged as meaningful. Interviewees described increased student articulation of learning goals and more criteria-anchored feedback interactions (Table 5). Paired survey items likewise showed substantial movement in practices that make learning targets usable to students, including presenting learning intentions in student-friendly language, using success criteria for feedback and self-assessment, and involving students in reflecting on progress toward mastery. These student-facing routines are a practical indicator that clarity was enacted in instruction, not only written in plans.

For leaders, the transfer point is broader than teacher clarity as a content choice. The leadership principle is to begin with an anchor practice that improves the quality of collaborative inquiry by making learning expectations explicit and evidence interpretable. Clarity is powerful in that role because it creates shared definitions of success. Once shared definitions exist, teams can analyze evidence and respond with greater precision (Hattie, 2023; Fisher et al., 2018).

Lesson 3: Variation is predictable at scale; manage it by calibrating depth, not compliance

Variation across teams was not described as a simple divide between implementing and not implementing. Instead, interviewees described differences in depth of enactment (Table 4). Some teams were described as procedural, moving through required elements with limited collective analysis. Other teams were described as engaging in shared responsibility for unpacking standards, interpreting evidence, and determining response. Variation also surfaced in classroom transfer. Success criteria could exist as a posted statement or function as an active reference point for feedback, self-assessment, and peer discussion. Student engagement with learning goals and criteria also varied in consistency.

Survey results supported this depth-and-transfer pattern. Planning routines reached higher levels of reported current practice than routines requiring sustained classroom enactment. For example, standards unpacking was reported at higher current practice levels than revisiting learning intentions throughout lessons or using success criteria as an ongoing learning tool. This does not signal failure. It signals where leadership calibration and coaching support matter most: not at the level of whether artifacts exist, but at the level of whether routines are being used to shape instructional moves and student learning behaviors.

For leaders, the implication is practical. The work of scale requires a small set of calibration targets. Leaders can distinguish “routine presence” from “routine impact” by monitoring whether teams use evidence against shared criteria and whether teams reliably produce response actions that match identified needs. In this case, variation was most informative when it was treated as guidance for where to invest coaching and where to strengthen shared expectations for what quality looks like (Fixsen et al., 2005; Fullan, 2016).

Lesson 4: Sustainability is a design issue built from time, coaching, and coherence

Sustained implementation in this case was described less as maintaining enthusiasm and more as maintaining structure (Table 6). Interviewees consistently referenced protected time, coaching facilitation, leadership alignment, and pacing that allowed refinement rather than constant replacement. These conditions functioned as a reinforcing system. Protected time made the work nonnegotiable. Coaching strengthened practice quality and translated expectations into workable routines. Leadership coherence stabilized the initiative architecture over time. Pacing created room for iterative improvement and shared calibration, particularly as vocabulary and evidence expectations became more precise.

This multi-year stability is part of what makes the case useful for other leaders. The district’s professional learning emphasis deepened and expanded over time, but the collaborative vehicle remained stable (Table 1). In a field where initiative churn is common, the case demonstrates that coherence can be built by protecting one improvement architecture and using it to carry evolving priorities. That design choice supports collective efficacy as a product of coherent work: shared language, shared evidence routines, and shared response expectations enacted within protected cycles of inquiry and improvement (Marshall, 2023). This emphasis on protecting the vehicle and preventing drift aligns with crisis-oriented initiative work that highlights predictable failure modes when coherence erodes or initiatives compete for attention (Fixsen et al., 2005; Marshall, 2024).

Implications for district and school leaders

For leaders seeking practical guidance, the implications are less about adopting one specific program and more about building a coherent improvement system in which priorities are aligned intentionally, embedded in existing routines, and supported by the people responsible for implementation. PLC+ functions as a content-agnostic improvement vehicle, but impact depends on whether the vehicle reliably converts evidence into instructional response. Leaders benefit from monitoring a small number of high-leverage routines that signal depth of enactment, classroom transfer, and student-facing clarity. To support practical transfer, we summarize the most observable, high-leverage implementation indicators as *leader look-fors*, consistent with evaluation work focused on usable lessons learned (Marshall et al., 2019).

Table 7 provides a concise set of leader look-fors aligned to the implementation patterns and mechanisms documented in this case, supporting practical monitoring with specificity while keeping expectations focused on a manageable set of

routines. Because Tables 2–5 and Figure 1 organize findings by the area investigated, with aligned survey shifts and interview frequencies, the leader look-fors translate those same areas into observable indicators.

Table 7

Leader Look-fors for High-Quality PLC+ (TLT) Enactment

Leader look-for	What you should see/hear	Where to look	Why it matters
Standards unpacking leads to precise learning	Teams can name the standard's intent (skills/knowledge), not just the topic; language is consistent across teachers.	TLT agendas, planning documents, team discussion	Prevents activity-first planning and anchors coherence.
Success criteria are specific and usable	Criteria describe what quality looks like; teachers and students can reference them; not vague ("do your best").	Lesson plans, posted criteria, teacher questioning, student work	Makes mastery visible and enables consistent evidence interpretation.
Common evidence is brought and actually analyzed	Teams review student work/results together and identify patterns (strengths, misconceptions, gaps).	Meeting artifacts, samples of student work, team notes	Moves collaboration from coordination to instructional improvement.
Evidence leads to a concrete response plan	Teams can answer: "What will we do differently next week?" including who needs what and how.	TLT outputs, intervention/enrichment plans, regrouping decisions	This is the turn where PLC+ becomes impact, not discussion.
Students can articulate the learning target	Students can explain what they are learning and how they'll know they're successful.	Classroom walkthroughs, student talk, exit tickets	Signals that clarity is student-facing, not just a planning tool.
Feedback is anchored in criteria	Feedback references criteria ("You met X; next is Y") rather than generic praise.	Teacher feedback, conferencing notes, student revisions	Strengthens learning behaviors tied to mastery and improvement.
Coaching and leadership calibrate quality	Coaches/leaders press for specificity ("What does success look like?" "What did you do for each group?").	Team meetings, walkthrough debriefs, coaching cycles	Reduces procedural compliance and increases depth of inquiry.

LIMITATIONS

This program evaluation is presented as a single-district case study. Survey findings reflect educator self-report; item-level valid *n* varies across questions, so reported percentages reflect respondents to each item rather than a uniform denominator. Interview findings add depth on routines and mechanisms but represent participant perspectives rather than direct observation and do not include systematic classroom observations, artifact audits, or student interviews. Student outcome evidence is descriptive and interpreted as aligned patterns across implementation evidence, educator accounts, and outcome indicators rather than causal impact. As a single case, the intent is analytic generalization, offering a detailed implementation account that may inform similar improvement efforts in other contexts. At the same time, the strength of the case lies in its detailed documentation of implementation architecture in practice, offering analytic insight into how improvement systems can be designed and sustained in real-world district contexts.

CONCLUSION

District improvement is more likely to be sustained when priorities are aligned to local strengths and needs and embedded within an implementation architecture that makes instructional practice routine. This case study examined Spartanburg

School District Two's TLTs, aligned to PLC+, as the collaborative vehicle that carried an early focus on teacher clarity into daily practice across schools. This distinction is central: impact is less attributable to any single instructional focus and more to the presence of an implementation architecture capable of carrying, integrating, and sustaining multiple priorities within a coherent system of work. Findings document consistent routines for standards unpacking, learning intentions and success criteria, and evidence-based instructional response, alongside reported shifts in planning, classroom practice, and student learning behaviors, with improving outcome patterns during the same period. The case illustrates how coherent systems of work, protected inquiry cycles, coaching and calibration, and stable expectations can connect professional learning to predictable doing.

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Understanding Leadership Efficacy in K–12 Schools: A Qualitative Study of Educational Leaders' Practice

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ABSTRACT

This qualitative study examines how K–12 educational leaders describe and make sense of their leadership practices related to instructional support, evaluation and improvement strategies, collaborative relationships and trust, and parent and community engagement. Drawing on open-ended survey responses from practicing school and district leaders, the study employs inductive thematic analysis to explore leadership efficacy as enacted through daily practice rather than expressed solely as an abstract belief. Guided by Bandura's self-efficacy theory, Bronfenbrenner's ecological systems theory, and transformational leadership theory as interpretive lenses, leaders' narratives are situated within the relational and contextual systems shaping leadership work. Findings reveal a coherent, practice-oriented leadership narrative grounded in collaboration, trust-building, reflective practice, and responsiveness to local context. Instructional leadership and evaluation were consistently framed as growth-oriented, relational processes, while collaborative relationships and trust emerged as foundational conditions enabling leadership practice across domains. Parent and community engagement was described as a reciprocal, boundary-spanning function rooted in communication, visibility, and partnership. Collectively, the findings position leadership efficacy as a relational and contextually embedded practice and highlight implications for leadership preparation and professional learning.

Keywords: educational leadership, leadership efficacy, instructional leadership, relational leadership, school-community partnerships, trust and collaboration

K–12 educational leaders operate at the intersection of instructional improvement, organizational management, relational leadership, and community engagement. Their work requires not only technical knowledge and managerial skill, but also the confidence to navigate complex interpersonal dynamics, contextual constraints, and competing demands. Research consistently affirms that school leadership is a critical lever for improving teaching and learning, with principals influencing student outcomes through how they shape instructional priorities, foster a culture of professional responsibility, and align organizational structures to support high-quality teaching and learning (Grissom et al., 2021; Hallinger, 2018). Yet, how leaders understand and enact this work varies considerably across roles and contexts.

Leadership self-efficacy, the belief in one's capacity to organize and execute leadership actions, has been identified as an important factor shaping leaders' motivation, persistence, and effectiveness (Leithwood & Jantzi, 2008). Leaders with stronger efficacy beliefs are more likely to engage in instructional leadership and sustain improvement efforts in the face of challenges. However, leadership efficacy does not develop or operate in isolation. It is influenced by contextual conditions such as school size, socioeconomic composition, geographic location, policy pressures, and the level of organizational support available to leaders. Principals working in rural or under-resourced settings, for example, often face staffing shortages, limited access to professional learning, and heightened community expectations, all of which can shape how leadership confidence is formed and enacted (Klocko & Justis, 2019; Preston et al., 2013).

Although prior research has established connections between leadership efficacy and leadership outcomes, much of this work relies on quantitative measures or focuses on discrete leadership functions. Less attention has been given to how educational leaders themselves describe their leadership practices and make sense of their perceived capacity to lead across interconnected domains of practice. In particular, limited qualitative research has examined how leaders describe these interconnected practices as part of a coherent leadership approach shaped by context.

This study examines how K–12 educational leaders describe and interpret their leadership practices across instructional support, evaluation and improvement strategies, collaborative relationships and trust, and parent and community engagement. By centering leaders' open-ended reflections, the study seeks to show how leadership efficacy is constructed and enacted in daily practice within varied school and district contexts. This study responds to that need by examining how leaders describe and make sense of their leadership practices in context.

LITERATURE REVIEW

Leadership Efficacy in Context

Educational leadership research consistently demonstrates that school leaders influence teaching and learning primarily through the conditions they create rather than through direct instructional control (Grissom et al., 2021; Hallinger, 2018). Leadership self-efficacy, defined as leaders' beliefs in their capacity to organize and execute leadership actions (Bandura, 1997), has been linked to instructional leadership behaviors, persistence in the face of challenges, and engagement in improvement efforts (Leithwood & Jantzi, 2008). Leaders who perceive themselves as capable are more likely to initiate change and sustain improvement initiatives.

Increasingly, research emphasizes that leadership efficacy is shaped by context rather than operating solely as an individual psychological attribute. Factors such as school size, socioeconomic composition, geographic location, policy demands, and district-level support influence how leadership confidence is developed and enacted (Hallinger, 2018). Leaders in rural or under-resourced settings often face staffing shortages, limited professional learning opportunities, and heightened community expectations—conditions that can both constrain and strengthen leadership efficacy (Klocko & Justis, 2019; Preston et al., 2013). These findings suggest that leadership efficacy is dynamic and contextually situated rather than uniform across settings.

Instructional Leadership and Teacher Support

Instructional leadership remains a central responsibility of K–12 educational leaders and a primary mechanism through which they influence student learning (Hallinger et al., 2020). Effective instructional leaders articulate a clear vision for teaching and learning, support teacher development, and align instructional practices with organizational goals (Brown et al., 2024). Coaching, feedback, data-informed reflection, and collaborative planning are consistently identified as core instructional leadership practices.

Contemporary scholarship increasingly conceptualizes instructional leadership as a relational and developmental process rather than a supervisory or compliance-driven function. Leaders who frame evaluation and feedback as opportunities for growth contribute to stronger instructional cultures and greater teacher engagement (Knight, 2019; Robinson et al., 2008). However, competing managerial demands, accountability pressures, and time constraints can limit leaders' capacity to prioritize instructional work, particularly in high-need or resource-constrained settings (Jackson et al., 2021).

Relational Leadership, Collaboration, and Trust

Trust and collaboration are widely recognized as foundational to effective school leadership and organizational improvement. Trust supports professional collaboration, risk-taking, and collective responsibility for student learning (Bryk & Schneider, 2003; Tschannen-Moran, 2014; Voelkel et al., 2024). Leaders play a central role in cultivating trust through transparency, consistency, visibility, and respect for professional expertise.

Transformational leadership theory further emphasizes the relational nature of leadership, highlighting practices such as shared vision, individualized consideration, and empowerment as mechanisms for building collective capacity (Bass & Riggio, 2006; Burns, 1978). Empirical studies link transformational leadership behaviors to increased teacher collaboration, collective efficacy, and organizational commitment (Leithwood & Jantzi, 2008; Ninković & Florić, 2016). Together, this

body of research underscores the importance of relational leadership practices in shaping both individual and collective efficacy within schools.

Parent and Community Engagement

School leadership extends beyond internal organizational relationships to include engagement with families and community stakeholders. Effective parent and community engagement has been associated with improved student outcomes, stronger school climate, and increased trust between schools and their communities (Auerbach, 2012; Banks et al., 2023; Ishimaru, 2014). Leaders who engage families through culturally responsive communication and reciprocal partnerships help align school practices with community values and needs.

Engagement practices are particularly important in schools serving historically underserved or marginalized communities, where leaders must navigate barriers such as language differences, transportation, work schedules, and historical mistrust (Mahfouz, 2020). Research suggests that leaders' confidence, adaptability, and relational skills play a critical role in shaping how effectively they engage families and external partners (Baroudi & Hojeij, 2020).

Summary and Gap

Collectively, the literature affirms that instructional leadership, relational trust, and stakeholder engagement are central to effective educational leadership and are shaped by contextual conditions. However, much of the existing research examines these domains separately or relies on external assessments of leadership behavior. Less attention has been given to how educational leaders themselves describe their leadership practices across interconnected domains of work and make sense of their perceived capacity to lead within varied contexts.

By centering leaders' narrative descriptions of practice, this study addresses this gap and contributes a practice-informed understanding of leadership efficacy as a relational construct embedded within specific school and community contexts.

Purpose of the Study

Although existing research has linked leadership efficacy to leadership outcomes, fewer studies examine how educational leaders themselves describe their leadership practices across interconnected domains of work. In particular, limited qualitative attention has been given to how leaders articulate their perceived capacity to lead within the varied and complex contexts in which they operate.

The purpose of this qualitative study was to examine how K–12 educational leaders describe and interpret their leadership practices related to instructional improvement, collaborative relationships and trust, and parent and community engagement across diverse school and district settings. By focusing on leaders' narrative responses, this study seeks to illuminate leadership efficacy as an enacted, relational, and contextually embedded practice rather than a static individual belief.

THEORETICAL FRAMEWORK

This qualitative study is grounded in three complementary theoretical perspectives that together offer a multifaceted understanding of leadership confidence, context, and practice in K–12 education.

Bandura's (1997) self-efficacy theory defines self-efficacy as an individual's belief in their capacity to plan for and carry out the actions required to achieve specific goals. Within educational leadership, this theory explains how leaders' beliefs about their abilities influence their motivation, persistence, and resilience, all factors essential to sustaining improvement and managing the demands of school leadership. In this study, Bandura's framework provides a psychological foundation for examining how leaders describe their confidence in addressing instructional, organizational, and interpersonal challenges. Participants' open-ended reflections illuminate how efficacy beliefs are enacted in practice.

To situate these beliefs within broader systems, the study also draws on Bronfenbrenner's ecological systems theory (Bronfenbrenner, 1979; Bronfenbrenner & Morris, 2006). Bronfenbrenner proposed that human development occurs within nested and interconnected systems, ranging from the immediate microsystem (school, staff relationships) to the exosystem and macrosystem (district policies, societal expectations, and state mandates). Applying this framework to leadership, the study interprets how contextual and environmental factors, such as rurality, access to professional development, and community expectations, shape leaders' confidence and behavior. This perspective highlights how external systems can either reinforce or limit leaders' self-beliefs and actions.

Finally, the study is informed by transformational leadership theory, first articulated by Burns (1978) and later expanded by Bass and Riggio (2006). This theory emphasizes leadership as a relational and values-driven process that inspires growth and shared purpose among followers. The four key components (idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration) serve as interpretive lenses for understanding how leaders describe their approaches to collaboration, trust-building, and change management. Leithwood and Jantzi (2008) demonstrated the theory's applicability to educational contexts, linking transformational behaviors to improved school culture and organizational capacity.

Together, these frameworks show leadership as both belief and behavior: a balance between internal conviction and contextual response. Bandura explains why leaders feel capable, Bronfenbrenner situates where these beliefs develop, and transformational leadership describes how these beliefs are enacted to influence others. In analyzing leaders' qualitative reflections, this integrated framework provides a cohesive structure for interpreting how confidence, context, and relationships interact to sustain effective school leadership.

Research Questions

Primary Research Question

RQ1: How do K–12 educational leaders describe their experiences and strategies for leading instructional improvement, cultivating trust, and building school-community partnerships across diverse school settings?

Sub-questions

RQ2: How do leaders describe the ways they support and evaluate teachers' instructional growth?

RQ3: How do leaders foster and sustain collaborative staff relationships, and what role does trust play in that process?

RQ4: How do leaders engage with families and community members to build partnerships that align with and advance the school's goals?

METHODOLOGY

Research Design

Using a qualitative descriptive approach, this study analyzed leaders' written responses to open-ended survey items using thematic analysis to capture common patterns and contextual nuances in perceptions of leadership efficacy. A qualitative descriptive approach was selected to prioritize participants' own language and meanings without imposing interpretive structures associated with phenomenological or narrative designs.

Participants and Sampling

Participants included K–12 educational leaders currently serving in schools and districts across varied geographic and socioeconomic contexts. These included assistant principals, principals, district coordinators, assistant superintendents, superintendents, and other administrators with direct school-level or district-level leadership responsibilities. The survey was distributed to a targeted sample of K–12 educational leaders across varied geographic and socioeconomic contexts.

Data Collection Procedures

Data for this qualitative study were collected electronically using Qualtrics. Participants, all of whom were practicing K–12 educational leaders, completed a brief set of demographic questions (e.g., leadership role, years of experience, school or system size, setting, and socioeconomic context) followed by a series of open-ended prompts designed to elicit descriptive accounts of their leadership contexts, practices, and perceptions. These open-ended responses served as the primary data source for the present analysis. The open-ended prompts were intentionally broad to allow leaders to describe practice in their own terms rather than respond to predetermined categories. Participation was voluntary and anonymous, and all procedures were approved by the institutional review board (IRB #251672-3).

Participant Characteristics

A total of 51 educational leaders participated in the study, representing a range of school- and district-level leadership roles (see Table 1).

Table 1

Demographic Characteristics of Participants

	Response Category	Frequency ($N = 51$)	%
Leadership Position	Principal	29	56.86
	Other Central Office Administrator	7	13.73
	Assistant/Vice Principal	6	11.76
	Superintendent	6	11.76
	Other	2	3.92
	Area/Associate/Assistant/Deputy Superintendent	1	1.96
Gender	Female	30	58.82
	Male	21	41.18
School District	Rural	33	64.71
	Suburban	12	23.53
	Urban	6	11.76
School Type	Public	45	88.24
	Private	3	5.88
	Charter	1	1.96
	Magnet	1	1.96
	Public Specialty	1	1.96
Title I Status	School-wide	43	84.31
	Other	4	7.84
	Targeted Assistance	2	3.92

Intercoder Reliability

To enhance the credibility and trustworthiness of the qualitative analysis, intercoder reliability procedures were employed across all open-ended responses. Two coders independently reviewed and coded participants' responses using a shared codebook developed through iterative refinement. Coding followed an inductive approach, with responses segmented into discrete meaning units to capture distinct leadership practices and perspectives (Campbell et al., 2013). Because participants often addressed multiple leadership ideas within a single response, comments could receive more than one code.

Intercoder agreement was calculated for each qualitative prompt using Cohen's kappa to account for chance agreement. Reliability varied across prompts in ways that reflected the conceptual complexity of the questions. For *Teacher Support – Instructional Improvement*, coders reached substantial agreement (85.7%; $\kappa = .71$). Agreement for *Strategies and Evaluation of Instructional Support* was moderate (54.2%; $\kappa = .46$), reflecting the frequent overlap among coaching, collaboration, data use, and evaluation practices described by participants. *Collaborative Relationships and Trust* yielded lower agreement (31.8%; $\kappa = .24$), consistent with the relational and overlapping nature of constructs such as communication, trust-building, shared leadership, and visibility. As Clarke et al. (2023) note, lower kappa values in complex qualitative coding contexts often reflect genuine interpretive complexity rather than analytic weakness, underscoring the importance of methodological transparency and collaborative consensus-building when analyzing relational and overlapping constructs. *Parent and Community Engagement* demonstrated substantial agreement (77.4%; $\kappa = .72$).

Following initial coding and reliability calculation, the coders met to review all discrepancies and reach consensus. These discussions focused on clarifying code boundaries, refining definitions, and resolving differences in emphasis rather than presence or absence of constructs. In several cases, coders identified the same thematic elements but differed in their assessment of relative prominence within a response. Consensus coding decisions were reached for all responses and served as the basis for the final thematic analysis.

Taken together, the reliability outcomes and consensus process support the analytic rigor of the qualitative findings and provide confidence that identified themes reflect consistent patterns in participants' descriptions of leadership practice.

Qualitative Analysis

Initial coding of *Teacher Support – Instructional Improvement* by the first author yielded six distinct categories: Collaborative Coaching and Support, Curriculum Development and Implementation, Instructional Leadership Identity, Reflective Practice and Professional Learning, Data-Informed Decision Making, and Barriers and Enablers to Instructional Leadership. Initial coding of *Strategies and Evaluation of Instructional Support* yielded seven distinct categories: Instructional Coaching and Feedback, Professional Learning Communities (PLCs) and Collaborative Planning, Data-Informed Decision Making, Implementation Monitoring and Evaluation, Professional Development and Teacher Capacity-Building, Culture of Trust and Support, and Barriers and Enablers to Instructional Leadership. Initial coding of *Collaborative Relationships and Trust* yielded six distinct categories: Trust Building, Open Communication and Transparency, Leader Visibility and Presence, Shared Leadership and Collaborative Structures, Recognition and Appreciation, and Relational Care and Respect. Finally, initial coding of *Parent and Community Engagement* yielded six distinct categories: Transparency and Communication, Visible/Active Presence, Specific Engagement Programs, Involve/Utilize Stakeholders, Dedicated Personnel/Structure, and Addressing Weakness/Need.

In total, *Teacher Support – Instructional Improvement* yielded 41 unique units from responses provided by 29 participants, *Strategies and Evaluation of Instructional Support* yielded 107 unique units from responses provided by 48 participants, *Collaborative Relationships and Trust* yielded 96 unique units from responses provided by 44 participants, and *Parent and Community Engagement* yielded 55 unique units from responses provided by 31 participants. Because responses to each open-ended item were optional, the number of participants contributing to each domain varied. These qualitative insights were used to contextualize and explain patterns in leadership practice across domains.

RESULTS

The purpose of this study was to examine how K–12 educational leaders describe their leadership practices across instructional support, evaluation and improvement strategies, collaborative relationships and trust, and parent and community engagement. Findings are organized by qualitative prompt and focus on leaders' descriptions of practice across varied school and district contexts. Interpretation of these patterns is reserved for the discussion section. Table 2 summarizes the alignment between the study's research questions and the key qualitative findings.

Teacher Support – Instructional Improvement

Leaders consistently described teacher support for instructional improvement as a collaborative and growth-oriented process rather than a supervisory function. Instructional support was framed through coaching conversations, co-planning, modeling, and feedback cycles that emphasized shared responsibility for improvement. One principal explained, "I support teachers by offering constructive, nonjudgmental feedback, modeling effective strategies, planning lessons collaboratively, and using student data to inform instructional decisions" (Principal, suburban school). Another leader highlighted "instructional credibility" as foundational to support, noting that "prior classroom experience" enabled more "meaningful guidance aligned to teacher needs" (Principal, rural school).

Leaders also frequently referenced collaboration with instructional coaches and the use of data. They described leveraging student performance data to inform instructional decisions and align support to specific classroom needs. Overall, instructional support was presented as a relational practice dependent on trust, shared expertise, and sustained engagement.

Strategies and Evaluation of Instructional Support

Leaders described evaluation as embedded within ongoing instructional support rather than as a standalone accountability process. Strategies emphasized collaboration, formative feedback, and continuous improvement through data-informed reflection. One leader explained, "We embed research-based strategies, model those strategies, use learning walks to evaluate effectiveness, and focus on data-driven PLCs" (Central office administrator, rural system). Evaluation practices were commonly situated within professional learning communities, observation–feedback cycles, and instructional walkthroughs aligned to instructional goals.

Across responses, instructional coaching and feedback emerged as central evaluative strategies. Leaders emphasized transparency and professional dialogue, framing evaluation as effective only when grounded in trust and aligned to instructional improvement efforts.

Table 2

Alignment of Research Questions with Key Findings

Research Question	Key Findings	Interpretive Alignment
RQ1. How do K–12 educational leaders describe their experiences and strategies for leading instructional improvement, cultivating trust, and building school-community partnerships across diverse school settings?	Leaders described instructional improvement primarily through collaborative coaching, curriculum-focused guidance, and reflective practice. Instructional leadership was framed as partnership-oriented rather than supervisory, emphasizing support, modeling, and shared responsibility for teacher growth.	Findings indicate that leaders conceptualize instructional efficacy as relational and developmental, grounded in collaboration and professional trust rather than directive control.
RQ2. How do leaders describe the ways they support and evaluate teachers' instructional growth?	Leaders emphasized data-informed decision-making, observation and feedback cycles, and continuous improvement processes. Evaluation was consistently framed as formative and growth-oriented, requiring transparency and professional dialogue.	Results suggest that leaders view evaluative practices as effective only when embedded within trusting relationships and aligned to instructional goals.
RQ3. How do leaders foster and sustain collaborative staff relationships, and what role does trust play in that process?	Trust emerged as a foundational leadership condition cultivated through communication, consistency, presence, and shared leadership. Leaders viewed trust as both a prerequisite for collaboration and an outcome of sustained relational practice.	Findings position trust as central to leadership efficacy, enabling instructional improvement, evaluation, and organizational coherence.
RQ4. How do leaders engage with families and community members to build partnerships that align with and advance the school's goals?	Leaders emphasized communication, relationship-building, and collaboration with families and community partners. Engagement was framed as an ongoing, reciprocal process shaped by accessibility, responsiveness, and shared commitment to student success.	Results highlight engagement as an extension of relational leadership, reinforcing the interconnected nature of internal and external leadership practices.

Collaborative Relationships and Trust

Trust-building emerged as a central leadership responsibility across contexts. Leaders described trust as cultivated through consistent communication, visibility, listening, and relational presence rather than assumed by role or authority. One principal noted, "Trust is the foundation for strong, collaborative relationships. Building relationships with staff is the priority, but trust also depends on clear communication and consistency" (Principal, rural Title I school). Visibility and accessibility were frequently cited as trust-building behaviors, with leaders emphasizing daily interactions and availability to staff.

Shared leadership and empowerment also appeared prominently. Leaders described distributing leadership through teams and collaborative structures to foster ownership and professional voice. Trust was positioned as both a prerequisite for collaboration and an outcome of sustained relational practice.

Parent and Community Engagement

Leaders framed parent and community engagement as relational, reciprocal, and responsive to local context. Engagement was described as ongoing relationship-building rather than episodic outreach. One leader explained, “I maintain open communication through multiple channels so families feel informed and valued, and I actively listen to community input” (Assistant principal, rural district). Leaders also emphasized visibility within the community, particularly when new to a district, as a means of building trust and credibility.

Engagement extended beyond families to include partnerships with community organizations, businesses, and agencies. Leaders highlighted the importance of investing in the community to build authentic relationships and shared commitment to student success.

Summary of Results

Across all domains, participants described leadership as an enacted practice shaped by relationships, collaboration, and responsiveness to context. Participants presented instructional support, evaluation, trust-building, and stakeholder engagement as interconnected aspects of daily leadership work rather than discrete functions. Because responses to each open-ended prompt were optional, the number of participants contributing to each leadership domain varied, and some domains are therefore more robustly represented in the data than others.

DISCUSSION

This study examined how K–12 educational leaders describe their leadership practices across instructional support, evaluation and improvement strategies, collaborative relationships and trust, and parent and community engagement. Participants’ descriptions of their leadership practices were interpreted as indicators of how leadership efficacy was enacted in context, rather than as direct or isolated measures of individual efficacy beliefs. The findings reveal a coherent, practice-oriented leadership narrative in which leadership efficacy is enacted through relationships, collaboration, and responsiveness to context rather than through positional authority or isolated technical tasks.

Interpreted through Bandura’s (1997) self-efficacy theory, Bronfenbrenner’s ecological systems theory (Bronfenbrenner, 1979; Bronfenbrenner & Morris, 2006), and transformational leadership theory (Bass & Riggio, 2006; Burns, 1978), leadership efficacy emerged as both relationally enacted and ecologically situated. Leaders’ narratives suggest that efficacy is shaped through daily interactions within schools, districts, and communities and reinforced through trust, shared purpose, and adaptive practice.

Leadership Efficacy as Enacted and Contextually Situated

Across leadership domains, participants described their work as interconnected rather than compartmentalized. Instructional leadership, evaluation, trust-building, and stakeholder engagement were portrayed as mutually reinforcing practices shaped by relational dynamics and contextual demands. From an ecological perspective, leaders’ efficacy beliefs appeared to develop within nested systems, including school culture, district structures, and community expectations (Bronfenbrenner, 1979; Bronfenbrenner & Morris, 2006). Leaders described adapting their practices in response to resource availability, staff capacity, and local needs, highlighting leadership efficacy as dynamic rather than fixed.

Consistent with Bandura’s (1997) assertion that efficacy is strengthened through mastery experiences and social persuasion, leaders linked their sense of capability to enacted practice rather than abstract belief. Transformational leadership behaviors, such as individualized consideration, shared vision, and relational influence, were evident in leaders’ descriptions of how they motivated and supported others (Bass & Riggio, 2006; Burns, 1978). These findings position leadership efficacy as something enacted through influence and collaboration rather than authority.

Instructional Leadership and Evaluation as Trust-Dependent Practices

Findings related to instructional support and evaluation underscore the central role of trust in effective leadership practice. Leaders consistently framed instructional improvement as a collaborative and developmental process grounded in

coaching, reflective dialogue, and shared responsibility. Evaluation was described as embedded within ongoing instructional support rather than functioning as a standalone accountability mechanism.

These descriptions align with research emphasizing instructional leadership as capacity-building and relational (Knight, 2019; Robinson et al., 2008). Leaders emphasized that evaluative practices were effective only when teachers perceived leaders as credible, supportive, and consistent, reinforcing trust as a mediating condition between leadership actions and instructional improvement (Tschannen-Moran, 2014; Voelkel et al., 2024).

Collaborative Relationships and Trust as Foundational Conditions

Collaborative relationships and trust emerged as foundational conditions underpinning all other leadership practices described by participants. Leaders portrayed trust-building as an intentional and ongoing process enacted through communication, visibility, consistency, and shared leadership. Rather than treating trust as a static organizational attribute, leaders described it as cultivated through daily interactions and reinforced over time.

This relational orientation aligns with transformational leadership theory's emphasis on moral purpose, shared leadership, and relational influence (Bass & Riggio, 2006; Burns, 1978). From an ecological perspective, trust appeared to strengthen connections across systems, supporting coherence between instructional goals, organizational structures, and professional culture (Bronfenbrenner, 1979; Bronfenbrenner & Morris, 2006).

Parent and Community Engagement as Boundary-Spanning Leadership

Leaders' descriptions of parent and community engagement further illustrate leadership as boundary-spanning work. Engagement was framed as relational and reciprocal, grounded in communication, visibility, and responsiveness rather than episodic outreach. Leaders emphasized meeting families where they are, addressing barriers to participation, and cultivating partnerships aligned with community values.

These findings are consistent with research positioning school leaders as connectors between schools and their broader social contexts (Auerbach, 2012; Banks et al., 2023; Ishimaru, 2014). Within Bronfenbrenner's framework, parent and community engagement reflects leadership activity within the mesosystem and exosystem, where schools intersect with families, agencies, and community organizations. Leaders' narratives suggest that efficacy in this domain involves navigating complexity and sustaining relationships across system boundaries.

Implications for Leadership Preparation and Practice

The findings suggest several implications for leadership preparation and professional learning. First, preparation programs should prioritize relational competencies, such as trust-building, communication, and collaborative problem-solving, alongside technical and managerial skills. Instructional leadership development should emphasize coaching models, formative evaluation, and data use within relational contexts rather than compliance-oriented supervision.

Second, professional learning for practicing leaders should provide opportunities for reflection, peer collaboration, and contextual problem-solving. Leaders in this study described efficacy as developing through experience and interaction, suggesting that learning structures that mirror these conditions may be particularly effective. Finally, leadership preparation and development should position family and community engagement as a core leadership responsibility requiring adaptive, culturally responsive strategies.

Limitations

Several limitations should be considered when interpreting the findings of this study. First, the data were drawn from open-ended survey responses, which allowed for broad participation but limited opportunities for follow-up probing or clarification. As a result, the depth and detail of responses varied across participants, and some leadership practices may be underrepresented.

Second, the study relied on self-reported data from practicing educational leaders. While participants provided reflective accounts of their leadership practices, responses may have been influenced by social desirability or by leaders' perceptions of effective leadership rather than direct observation of practice. The findings therefore reflect leaders' interpretations of their work rather than externally verified behaviors.

Third, participation was voluntary, introducing the possibility of self-selection bias. Leaders who chose to respond may be more reflective, confident, or engaged in leadership development than those who did not participate. Additionally,

although the sample included leaders from multiple roles and contexts, the majority served in public, rural, and school-wide Title I settings, which may limit transferability to other educational environments.

Finally, this qualitative analysis represents a snapshot in time. Leadership efficacy is dynamic and may shift in response to organizational change, policy contexts, or professional experience. Future research using longitudinal designs or multiple data sources could provide a more comprehensive understanding of how leadership efficacy develops and evolves over time.

CONCLUSION AND FUTURE DIRECTIONS

This qualitative study examined how K–12 educational leaders describe their leadership practices across instructional support, evaluation and improvement strategies, collaborative relationships and trust, and parent and community engagement. Across domains, leaders portrayed leadership efficacy not as a static personal belief, but as an enacted practice shaped through relationships, collaboration, and responsiveness to contextual demands. Leadership was consistently described as work carried out with others and embedded within the daily realities of schools, districts, and communities.

By centering leaders' narrative accounts, this study contributes a practice-informed understanding of leadership efficacy that complements existing quantitative research. The findings highlight the importance of relational leadership practices, such as trust-building, coaching, shared decision-making, and community partnership, as central to how leaders understand and enact their roles. Rather than describing instructional leadership, evaluation, trust, and engagement as discrete functions, leaders framed these practices as integrated aspects of their everyday leadership work, a perspective that represents a key contribution of this study.

These findings have implications for leadership preparation and professional learning. Preparation programs should prioritize relational competencies alongside technical and managerial skills, emphasizing coaching-oriented instructional leadership, formative evaluation, and collaborative problem-solving. Professional learning for practicing leaders should likewise provide opportunities for reflection, peer collaboration, and context-sensitive learning that mirror the relational conditions through which leadership efficacy develops.

Future research could extend this work through longitudinal qualitative designs or mixed-methods approaches to examine how leadership efficacy evolves over time and across roles or contexts. Additional studies might also explore how leadership preparation programs intentionally cultivate the relational practices associated with efficacy in complex educational environments.

As schools and districts continue to face complex instructional, organizational, and community challenges, understanding leadership efficacy as a relational and context-sensitive practice offers a promising direction for both research and practice. By centering leaders' lived experiences, this study underscores the value of practitioner-informed inquiry for strengthening leadership development and supporting effective school administration.

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Social Media Use Among School Administrators: A Mixed-Methods Approach to Scale Development and Validation

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ABSTRACT

This mixed-methods study had two aims: to determine the purpose of school administrators' use of social media and to develop and validate a scale measuring those purposes. In the qualitative phase, 15 school principals were interviewed individually, and the social media accounts of five principals were analyzed to identify purposes of use. In the second phase, an instrument was developed and validated across two independent samples of school administrators attending separate in-service training programs organized by the Turkish Ministry of National Education (MONE). Exploratory factor analysis (EFA; $n = 156$), using principal axis factoring with direct oblimin rotation, revealed a three-factor structure: stakeholder communication, personal use, and professional development, accounting for 65.52% of the total variance. Confirmatory factor analysis (CFA; $n = 148$) supported the factor structure with satisfactory model fit ($\chi^2/df = 1.60$, CFI = .955, RMSEA = .064). Convergent and discriminant validity were established through average variance extracted, composite reliability, McDonald's omega, and the Fornell-Larcker criterion.

Keywords: social media use; school administrators; scale development; digital leadership; confirmatory factor analysis

Internet connectivity has become a necessity in modern life (Srivastava, 2012), and the exponential growth of smartphones and high-speed internet over the past decade has resulted in an unprecedented increase in social media use (Yunus, 2023). A recent report on global technology usage statistics showed that approximately 4.76 billion people were social media users (We Are Social & Meltwater, 2023). Driven by technological advances and pandemic outbreaks, the prevalence and amount of time spent using social media have steadily increased (Tullett-Prado et al., 2023).

The broad range of meanings associated with the term social media has made its definition and impact a highly controversial issue. For instance, while some researchers have highlighted concerns about social media's potential to induce social anxiety and addiction (see Alkis et al., 2017; Baltacı, 2019; Dobrea & Pasarelu, 2016; O'Day & Heimberg, 2021; Willis et al., 2023; Wu et al., 2024), others (i.e., Donelan, 2016; Nisar & Whitehead, 2016; Rao & Kalyani, 2022; van Zoonen & Rice, 2017) have lauded its role in facilitating networking, marketing, and communication. Ambiguity remains about which instruments, venues, and social entities fall under the definition of social media, even though it has become an integral part of many people's daily lives (McCay-Peet & Quan-Haase, 2017). Recent studies also emphasize that social media serves multiple simultaneous purposes, functioning both as a professional platform for knowledge sharing and as a personal space for identity construction and social interaction (Beckman et al., 2024; Bowman et al., 2022).

In the educational field, the debate has shifted toward understanding how social media is not only shaping student experiences but also transforming the practices of school administrators and leaders (Cox & McLeod, 2014; Miller et al., 2023). In a general sense, social media is referred to as Web 2.0 services that allow users to communicate, share, and exchange ideas in both corporate and/or personal environments (as cited in Taylor & Dobbins, 2021). More broadly, social

media are digital tools used for social interaction, including social networking, SMS, and video chats (Hamilton et al., 2023). Social media is a means of communicating, collaborating, creating, modifying, and sharing content by individuals, communities, and organizations (McCay-Peet & Quan-Haase, 2017). For school leaders, these affordances extend beyond teaching and learning; they are increasingly framed as leadership and governance tools that enable transparency, communication, and professional networking (Miller et al., 2023; Yusuf et al., 2020). This shift is further evidenced by global crises, such as the Coronavirus pandemic, which have led school leaders to rely more on digital platforms for communication, coordination, and crisis management. In this context, administrators' use of social media can be understood as a micro-level educational reform that reflects changing norms of digital leadership and governance.

Over the past decades, organizations have systematically adopted social media tools to serve certain functions such as announcing, communicating, collaborating, managing knowledge, and socializing (Schlagwein & Hu, 2016). Social media may also provide an open forum for organizations to solve problems, get feedback, find new ways to interact with stakeholders, and market their services (Bankert, 2014). Social media supports an organization's capacity for exploratory learning, i.e., "understanding, recognizing and acquiring external knowledge" (Schlagwein & Hu, 2016, p. 4), and schools are no exception. Principals are therefore expected to integrate digital communication into their leadership practices to ensure responsiveness and adaptability in rapidly changing environments.

In an era of change, adaptation, and speed, it is essential for educational leaders to communicate quickly and effectively with their stakeholders. As Griffin (2014, p. 2) states, school principals "must adapt to an ever-changing world with ever-changing expectations." Social media platforms offer school leaders the opportunity to connect with their stakeholders, to disseminate essential messages and announcements, and to engage with parents and students (Cox & McLeod, 2014; Powers & Green, 2016) in ways that were not previously possible. Compared with traditional communication methods, the internet and mobile communication technologies now enhance communication and interaction with stakeholders inside and outside organizations (Korkmaz et al., 2017), regardless of time or place. For instance, school administrators may share news and information about the school in real time by posting photos from school events, sports scores, and even audio from school musicals on social media. As a communication tool, social media may connect school leaders to all stakeholders (Giordano, 2022), while it can also help stakeholders come together with school staff and administrators. Therefore, school stakeholders can participate directly in the daily life of their school.

At the same time, social media provides an avenue for professional growth. Beyond communicating with stakeholders, it offers opportunities for professional development and collaboration (Hampton, 2016), as well as a chance to learn from school leaders worldwide. Educational leaders also use social media to stay up to date on current trends and effective strategies in education, and to network with fellow educators and leaders in the field (Fancera, 2020; Ugur & Koç, 2019). Social media-based online communities offer school leaders a conducive space to openly discuss critical issues with their colleagues (Miller et al., 2023). In addition, the presence of such networks on social media may provide school leaders with broad resources for problem-solving, access to different perspectives, and helpful professional feedback (Barkley, 2012).

Overall, as school leaders work to improve their schools and support the students and families they serve, social media continues to emerge as an extremely powerful tool. Yet, it should be noted that although the use of social media can bring many benefits, it also can cause some concerns about privacy, security, and appropriate use. For example, Ugur and Koç (2019) found that Turkish principals are hesitant about using social media and need to increase their familiarity with it to implement technology more effectively in schools. Fox and Bird (2017) also state that many educators have become reluctant to use social media networks within their institutional settings or classroom due to some level of fear. Dunsmore (2021) identified several challenges that principals in New Zealand schools encounter with social media, such as issues related to digital footprints' permanence, protecting privacy, addressing the misuse of social media platforms, and safeguarding their learning organizations from potential threats.

Recent research has also examined administrators' social media practices in connection with broader constructs such as social capital. For example, Urhan et al. (2024) found that school administrators' social media use can be grouped into dimensions such as research/information, entertainment, recognition, and development, which contribute to their social capital. Such work highlights the diversity of purposes for which principals use social media, but it remains primarily descriptive. Despite this growing body of research, there is still limited evidence on the specific purposes that guide principals' social media practices, and validated instruments tailored to this population remain scarce. Existing scales often address general users or focus on psychological outcomes such as anxiety or addiction (Alkis et al., 2017; Willis et al., 2023), leaving leadership- and communication-oriented dimensions underexplored.

As discussed above, the use of social media by school administrators has become increasingly prevalent in recent years and has the potential to greatly impact the way they communicate and engage with their school community. Therefore, the purposes for which school administrators use social media, whether personal or institutional, warrant systematic

investigation. Few studies have described how school leaders have experienced using social media as an inclusive communication medium with school community members (Cox & McLeod, 2014). By understanding the purposes and benefits of social media usage among school administrators, we can gain insights into how it is being utilized to improve communication, transparency, and professional development within the education sector. Furthermore, this research can provide valuable input for comparing school leaders' different purposes for using social media. The current study is expected to contribute to the existing literature by providing a comprehensive examination of school administrators' purposes and the prevalence of social media use. The main purpose of the study was to qualitatively explore school administrators' social media use. Based on the qualitative findings, it was also intended to develop a valid and reliable scale that could be used to measure the school administrators' intention to use social media.

METHODS

This study adopted a sequential exploratory mixed-methods design (QUAL → QUAN) to develop and validate a scale measuring the purposes of school administrators' social media use. In this design, qualitative findings guided the generation of quantitative items, and subsequent quantitative analyses provided evidence of the scale's reliability and validity (Creswell & Plano Clark, 2018).

The research was conducted in two distinct phases. In Phase 1 (qualitative exploration), interviews with school administrators and analysis of their social media accounts were conducted to identify the main purposes of social media use. In Phase 2 (quantitative scale development and validation), items were developed based on the qualitative findings and validated across two independent samples. The quantitative phase of the study was divided into two independent steps: exploratory factor analysis and confirmatory factor analysis.

Phase 1: Qualitative Exploration

Participants

Semi-structured interviews were conducted with 15 school principals. The principals were selected using purposeful sampling to ensure variation in gender, years of experience, and school type.

Data Collection

Interviews lasted 30-45 minutes and focused on uncovering the purposes and motivations behind administrators' social media use. In addition, the social media accounts of five principals were analyzed to triangulate the interview findings (Lincoln & Guba, 1985) and provide further insight into their actual practices.

Data Analysis

The gathered data were analyzed using thematic analysis (Braun & Clarke, 2006). Initial codes were generated across the data set and then collated into candidate themes. Thereafter, each theme was reviewed against the coded extracts and the data set as a whole. The analysis revealed three overarching themes: announcements, professional development, and personal use. These themes provided the conceptual foundation for item generation in the subsequent quantitative phase.

Phase 2: Quantitative Scale Development and Validation

Instrument Development

Based on the qualitative findings, an initial pool of items was generated to represent the identified themes. Items were written as concise statements reflecting specific aspects of administrators' social media use. In developing the items, particular attention was paid to the expressions that were frequently repeated and commonly emphasized by participants, ensuring that the items authentically reflected their shared experiences and perspectives. To ensure content validity, the draft scale was reviewed by experts in educational administration and measurement, who provided feedback on clarity, representativeness, and relevance of the items.

Participants

The quantitative phase was conducted with two independent samples of school administrators recruited from two separate groups attending an in-service training program organized by the Turkish Ministry of National Education (MONE). The EFA sample comprised 156 school administrators (Phase 2a): predominantly male ($n = 151$, 96.8%), with 79 principals (50.6%) and 77 vice principals (49.4%), aged 23-60 years ($M = 36.19$, $SD = 6.94$), and administrative experience ranging from 1 to 23 years ($M = 5.42$, $SD = 4.57$). The CFA sample comprised 148 school administrators from a separate program (Phase 2b): 131 male (88.5%) and 17 female (11.5%), with 60 principals (40.5%) and 88 vice principals (59.5%), aged 23-58 years ($M = 36.22$, $SD = 7.17$), and administrative experience ranging from 1 to 30 years ($M = 6.09$, $SD = 6.16$). The two samples were demographically comparable across gender, age, position, and experience.

Procedure

Following a process of refinement based on the qualitative findings and expert feedback, the final version of the instrument was administered in paper-and-pencil format during the in-service training program. Participants were invited to respond to all items on a 5-point Likert-type scale ranging from 1 (strongly disagree) to 5 (strongly agree). This study was conducted in accordance with the ethical principles of the Declaration of Helsinki, and ethical approval was obtained from the institutional ethics committee of the authors' affiliated university. Prior to data collection, all participants were informed about the purpose of the study, the voluntary nature of their participation, and the confidentiality of their responses. All participants provided written informed consent before participating in the study. The administration of the questionnaire required approximately 20 minutes, and participants completed it independently and without time constraints.

Data Analysis

Analyses were conducted using SPSS 21 and AMOS 24. Data were screened for missing values and normality prior to analysis. For Phase 2a (EFA), the Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy and Bartlett's Test of Sphericity were first examined to confirm the factorability of the correlation matrix. EFA was conducted using principal axis factoring (PAF) with direct oblimin rotation ($\delta = 0$), which is appropriate when latent factors are expected to be intercorrelated (Fabrigar et al., 1999). The number of factors to retain was determined using parallel analysis (Horn, 1965), the eigenvalue ≥ 1.00 rule, and the scree plot; all three criteria consistently supported a three-factor solution. Items with factor loadings below .40 or exhibiting problematic cross-loadings were removed iteratively. Internal consistency was assessed using Cronbach's alpha (α) and McDonald's omega (ω). For Phase 2b (CFA), a three-factor oblique model was specified in AMOS 24 using maximum likelihood estimation. Model fit was evaluated using χ^2/df , CFI, TLI, IFI, and RMSEA with 90% confidence intervals and PCLOSE. Convergent validity was examined via average variance extracted (AVE) and composite reliability (CR), and discriminant validity was tested using the Fornell–Larcker criterion.

FINDINGS

Qualitative Findings: Purposes of Social Media Use by School Principals

The qualitative phase of the study, based on in-depth interviews with 15 school principals and document analysis of selected social media accounts, revealed that school leaders engage with social media for three interrelated but distinct purposes. The most frequently expressed purpose was the dissemination of announcements and information. Principals reported that they actively use social media platforms to communicate with various stakeholders, including teaching staff, students, and parents. For staff, the posts typically included official updates such as ministry circulars, training announcements, and examination schedules, as well as informal materials like photographs from school events. When addressing parents and prospective parents, principals tended to share pedagogical information, promote school programs, showcase extracurricular activities, and communicate the school's vision and values. Posts directed at students, on the other hand, were often geared towards reinforcing moral and civic values, such as environmental awareness, patriotism, the importance of education, and healthy lifestyle choices. These posts occasionally overlapped with promotional content designed to highlight the school's achievements and facilities.

A second theme was using social media for professional development and collaboration. Principals indicated that they regularly utilized online platforms to access articles, best practices, and current educational policies, and to follow discussions or innovations in the field. They perceived social media as a space for ongoing learning and problem-solving,

where they could connect with other administrators or educators to share insights and experiences relevant to school leadership.

In addition to these professional purposes, participants also acknowledged using social media for personal reasons. Although most emphasized that their primary use was professional, they did not exclude activities such as sending private messages, commenting on friends' posts, or sharing humorous content and personal photographs. These uses reflect the blurred boundaries between personal and professional life commonly reported in literature on educational leadership in the digital age.

Quantitative Phase: Validation of the School Administrators' Social Media Use Scale (SASMUS)

A 24-item pool, representing the different purposes principals use social media for, was developed based on the initial qualitative phase of the study. To evaluate content and face validity, the initial draft of the scale was submitted to an expert panel comprising three scholars—two with expertise in educational administration and one in educational technologies. After revising the draft scale according to feedback from the expert panel, the instrument was administered to two independent samples across separate in-service training programs.

Phase 2a: Exploratory Factor Analysis (n = 156)

The KMO value of .886 and Bartlett's Test of Sphericity, $\chi^2(105) = 1681.04$, $p < .001$, confirmed the factorability of the correlation matrix. The KMO measure and Bartlett's test determine whether the items share sufficient common variance and whether inter-item correlations are strong enough to be meaningful (Watkins, 2018). Collectively, they indicate whether administrators' specific social media uses can be categorized into broader dimensions. Parallel analysis, the eigenvalue ≥ 1.00 rule, and the scree plot consistently supported a three-factor solution. Parallel analysis retains only the factors with eigenvalues exceeding those generated from random datasets of identical size. Following iterative item removal, 15 items were retained, accounting for 65.52% of the total variance. Factor loadings ranged from .488 to .926, and communalities ranged from .527 to .778. Table 1 presents the pattern matrix, communalities, and reliability estimates.

As shown in Table 1, the retained 15 items loaded cleanly on three factors with no problematic cross-loadings. Factor 1, labeled *stakeholder communication*, comprised five items (Q3, Q5, Q6, Q7, Q13) and explained 46.84% of the variance (e.g., "to make announcements to parents"). Factor 2, labeled *personal use*, comprised five items (Q19, Q20, Q21, Q26, Q28) and explained an additional 11.28% of the variance (e.g., "to send messages to my friends"). Factor 3, labeled *professional development*, comprised five items (Q16, Q17, Q18, Q29, Q33) and explained 7.40% of the variance (e.g., "to follow best practices in education"). Interfactor correlations ranged from .40 to .56 in absolute value, confirming the appropriateness of oblique rotation. Internal consistency estimates were satisfactory across all subscales (Nunnally, 1978): stakeholder communication ($\alpha = .905$, $\omega = .905$), personal use ($\alpha = .882$, $\omega = .882$), and professional development ($\alpha = .898$, $\omega = .900$). This pattern confirms the empirical distinctness of the three purposes. Stakeholder communication emerged as the dominant dimension, and the item concerning communication with other educators showed the weakest factor loading, likely reflecting its conceptual overlap between professional development and stakeholder communication.

Phase 2b: Confirmatory Factor Analysis (n = 148)

Unlike the data-driven approach of exploratory factor analysis, confirmatory factor analysis evaluates a predefined structure in an independent sample. Model fit for the proposed three-factor, 15-item model was assessed against conventional benchmarks, with CFI and TLI values $> .90$ and RMSEA $< .08$ indicating acceptable fit. The results of the CFA conducted on the three-factor model indicated that the model's fit indices were at an acceptable level: $\chi^2(86) = 137.54$, $\chi^2/df = 1.60$, CFI = .955, TLI = .945, IFI = .956, RMSEA = .064, 90% CI [.043, .083], PCLOSE = .127. All standardized factor loadings were statistically significant ($p < .001$) and ranged from .672 to .874. Evidence for convergent validity was supported by AVE values exceeding .50 for all factors: stakeholder communication (AVE = .586, CR = .875, $\omega = .875$), personal use (AVE = .596, CR = .880, $\omega = .880$), and professional development (AVE = .564, CR = .865, $\omega = .865$). Discriminant validity was confirmed via the Fornell–Larcker criterion, whereby the square root of each factor's AVE exceeded all inter-factor correlations (see Table 2 and Figure 1).

Table 1

Exploratory Factor Analysis Results of School Administrators' Social Media Use Scale (n = 156)

Items	Factor Loadings			h ²	<i>r</i>
	F1	F2	F3		
<i>F1: Communication with Stakeholders</i> ($\alpha = .905, \omega = .905$)					
Q6. to make announcements to students	.926			.778	.811
Q7. to communicate with parents	.864			.725	.809
Q5. to make announcements to parents	.785			.696	.783
Q3. to publicize student achievements	.684			.563	.706
Q13. to make announcements to teachers	.659			.561	.700
<i>F2: Personal use</i> ($\alpha = .882, \omega = .882$)					
Q21. to look at my friends' photos/comments		.894		.687	.746
Q20. to chat with friends		.850		.725	.748
Q26. to send a message to my friends		.689		.659	.744
Q28. to share my personal information/photos		.647		.595	.702
Q19. to comment on my friends' posts		.567		.527	.644
<i>F3: Professional Development & Collaboration</i> ($\alpha = .898, \omega = .900$)					
Q16. to access articles and essays on education			.880	.686	.748
Q17. to find answers to the problems I experience			.876	.732	.775
Q29. to follow current developments in education			.769	.689	.799
Q18. to follow best practices in education			.639	.622	.732
Q33. to communicate with other educators			.488	.582	.691
Eigenvalue	7.37	2.01	1.43		
Explained Variance (Total: 65.52%)	46.84	11.28	7.40		

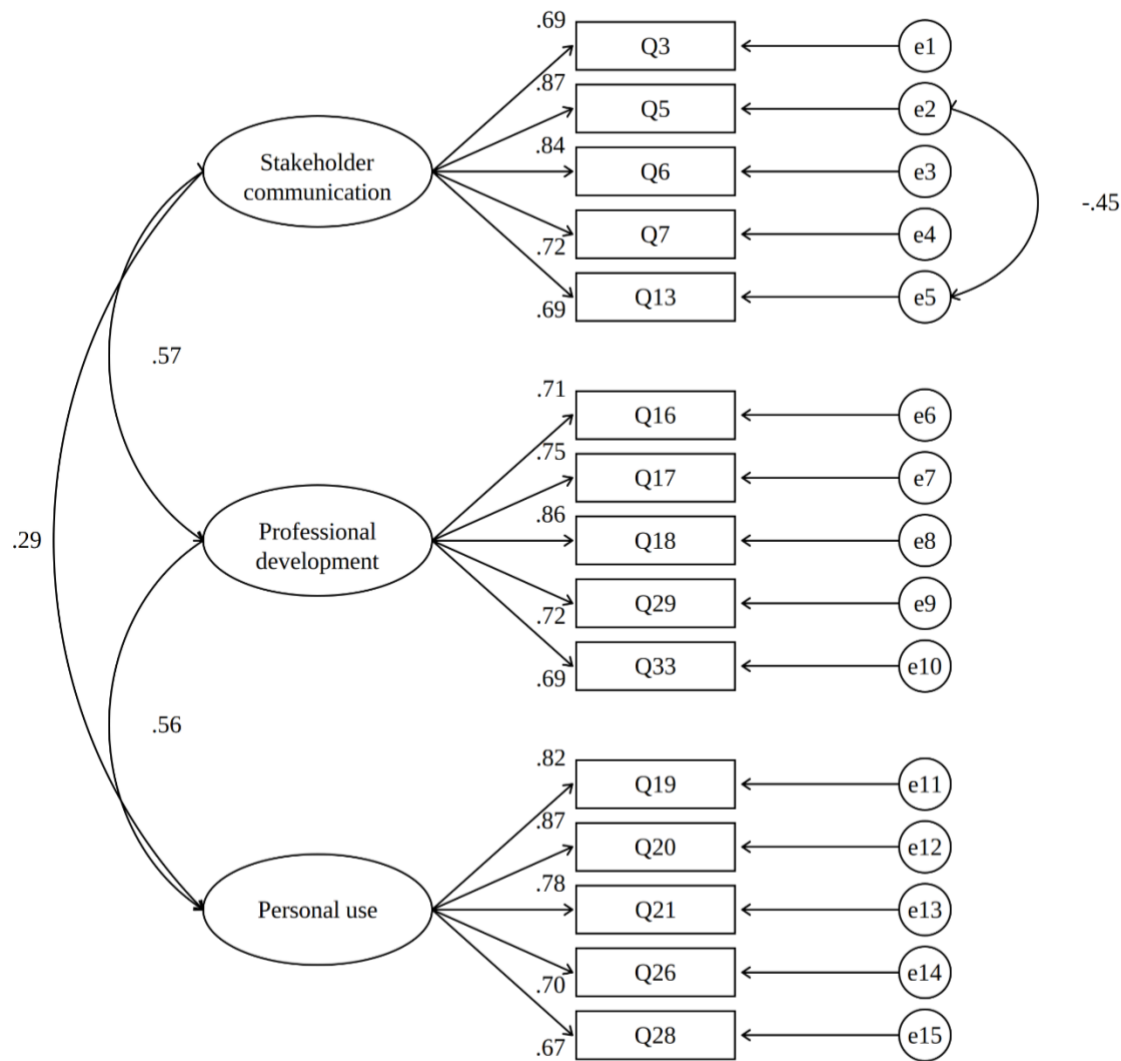
Note. $n = 156$. Principal Axis Factoring (PAF) with Direct Oblimin Rotation; factor loadings below .40 are not shown. h^2 = common variance; r = adjusted item-total correlation. Eigenvalues are initial eigenvalues, whereas the percentages of explained variance are based on the extraction sums of squared loadings.

Table 2**Confirmatory Factor Analysis: Standardized Loadings and Validity Indices for the SASMUS (n = 148)**

Items	β	SE	<i>t</i>	h^2
<i>Factor 1: Communication with Stakeholders</i> (AVE = .586, CR = .875, α = .866, ω = .875)				
Q3.	.689	—	—	.475
Q5.	.874	.155	9.31	.763
Q6.	.836	.138	9.28	.699
Q7.	.716	.134	8.05	.513
Q13.	.694	.128	7.48	.482
<i>Factor 2: Personal Use</i> (AVE = .596, CR = .880, α = .877, ω = .880)				
Q19.	.816	—	—	.666
Q20.	.871	.094	11.90	.758
Q21.	.778	.091	10.36	.605
Q26.	.705	.099	9.12	.497
Q28.	.672	.090	8.60	.452
<i>Factor 3: Professional Development & Collaboration</i> (AVE = .564, CR = .865, α = .861, ω = .865)				
Q16.	.715	—	—	.511
Q17.	.750	.129	8.49	.563
Q18.	.861	.113	9.60	.741
Q29.	.723	.111	8.20	.523
Q33.	.694	.120	7.89	.482

Note. β = standardized factor loading. AVE = average variance extracted; CR = composite reliability; ω = McDonald's omega; α = Cronbach's alpha. All loadings are significant at $p < .001$. The model includes an error covariance between Q5 and Q13 (standardized estimate = $-.451$).

As Table 2 demonstrates, the factor structure derived from the initial sample was replicated in an independent sample. All items loaded significantly onto their hypothesized factors, with Average Variance Extracted (AVE) exceeding .50 across all dimensions. Together with the discriminant validity evidence, this indicates that the three subscales can be scored and interpreted independently. This multidimensionality allows the instrument to capture distinct behavioral profiles, such as an administrator who frequently utilizes social media for stakeholder communication but rarely for professional learning.

Figure 1**Confirmatory Factor Analysis Model of the SASMUS (n = 148)**

Note. Standardized estimates are presented. All factor loadings are significant at $p < .001$. e1–e15 denote error terms.

DISCUSSION & CONCLUSIONS

This study developed and validated the SASMUS using a sequential exploratory mixed-methods design. Data analysis yielded three core dimensions of school administrators' social media use: stakeholder communication, personal use, and professional development. The present study is situated within the theoretical framework of uses and gratifications theory (Katz et al., 1973). The dimensions explored in this study reflect the purposive, active ways school leaders select and use social media to meet distinct professional and personal needs. The findings suggest that administrators do not merely passively receive technology; rather, they proactively use digital platforms for specific communicative and organizational purposes.

Social media's prominence as a communication tool was particularly evident, as school leaders reported using platforms to share announcements, celebrate student achievements, and foster school–community engagement. These findings align with previous research emphasizing the importance of social media for stakeholder communication and school promotion (Carpenter & Krutka, 2014). The qualitative insights show how broad this dominant dimension is. It spans routine

administrative tasks, such as sharing ministry circulars with staff, and strategic community building. The latter ranges from pedagogical updates for parents to civic awareness and positive behavioral norms for students. Principals do not treat social media as a generic tool. They use it as a direct extension of their institutional leadership. Showcasing school achievements is central, driving community engagement and shaping institutional image at the same time. This is also where institutional risks concentrate. These platforms are instantaneous, and any post representing the school is read as an official statement, whatever its tone. Online representation and communication ethics therefore need explicit focus in leadership preparation.

Generative AI is reshaping this landscape in two respects. These tools are now widely used by individuals and institutions alike. School principals, however, occupy a distinctive position. They use social media both to represent their institutions and to communicate in their own names. This dual role calls for two related competencies. The first is the ability to use generative tools to produce written, visual, and multimodal content for communicating with stakeholders. The second is the capacity to recognize and verify synthetic content circulating among stakeholders, since the same tools can generate material that appears authentic but is fabricated. A false post attributed to a school may spread rapidly and damage institutional credibility before the school can correct it. Leadership preparation should therefore extend beyond content production to include verification, media literacy, and safeguarding the school's authentic digital voice. The SASMUS provides a starting point for such programs, since the profile it yields indicates the purposes around which a principal's social media use is concentrated. A profile weighted towards stakeholder communication signals high institutional visibility, and visibility carries greater risk where verification skills remain underdeveloped.

Professional development emerged as a narrower, more targeted dimension. The study supports the view that school administrators increasingly engage with social media as part of their professional learning networks to access educational resources, stay informed about best practices, and collaborate with peers (Carpenter & Krutka, 2014; Trust et al., 2016). Principals treat it as a space for problem-solving and policy updates, not as a channel for daily broadcasting. This explains its moderate relationship with the other dimensions without merging into them. These networks are unbound by geographic borders, so the dimension also opens a route to international collaboration. Personal use emerged as a distinct factor, only weakly related to institutional communication. Although secondary to professional objectives, administrators acknowledged that social media also served personal and social interaction needs. This blurring of professional and personal boundaries highlights the importance of understanding digital leadership not only in terms of administrative tasks but also in relation to identity, relationships, and informal learning (Kimmons & Veletsianos, 2015). Taken together, the findings indicate that school leaders do not simply adopt social media. They compartmentalize their digital presence, balancing institutional public relations against professional networking and personal socialization. The SASMUS makes this balance visible. Because it measures purposes rather than platforms, it can trace how the balance shifts as digital environments change, and pairing it with data on platform preferences is a clear direction for future research.

The SASMUS instrument is psychometrically sound for assessing school leaders' social media use across multiple dimensions. EFA revealed a factor structure that accounted for 65.52% of the total variance. Subsequent CFA analysis on a separate sample yielded similar results, meeting the standard of goodness of fit ($\chi^2/df = 1.60$, CFI = .955, RMSEA = .064). The convergent validity of the factor structure was supported by the AVE > .50, CR > .85, and McDonald's ω > .85 for all subscales. The discriminant validity of the factor structure was substantiated by the Fornell–Larcker criterion. The study's two-phase, independent-sample validation design offers a methodological advantage when compared with the majority of extant scale development studies in educational leadership. The structural consistency across samples supports both the replicability and applied utility of the instrument.

Consequently, this study's findings have significant practical and theoretical implications. For school administrators, the recognition that social media fulfills a tripartite function, serving as a medium of communication, a professional tool, and a means of personal connection, may engender more deliberate and purposeful digital practices. The findings emphasize the importance of incorporating digital leadership competencies into professional development programs, with a particular focus on communication ethics, online institutional representation, and engagement with professional learning networks. This is particularly noteworthy for ministry officials and in-service training providers. For researchers, the SASMUS offers a validated, multidimensional instrument that can be used across different contexts to examine how social media use by school administrators is influenced by various demographic, institutional, and cultural factors.

LIMITATIONS & FUTURE RESEARCH

Although this study's findings provide valuable insights into school administrators' social media use, several limitations should be acknowledged. The two quantitative samples were drawn from a single national context and were predominantly male (96.8% and 88.5%), reflecting the gender composition of school administrators in Turkey. This imposes two

constraints on generalizability. It precludes any test of measurement invariance across gender. It also raises questions about the applicability of the scale in systems where women constitute a larger share of K–12 leadership. Because online visibility and audience management may follow gendered patterns, school leaders' purposes for using social media may also differ. Comparative applications of the SASMUS should therefore account for this limitation, particularly in contexts with a balanced or female-majority administrative workforce, and establish measurement invariance wherever possible before comparing scores across groups. The present validation was further confined to the factor structure and internal consistency of the instrument. Future studies should examine test–retest reliability alongside measurement invariance across school level and administrative role. Although the CFA results were satisfactory, replication with larger and more diverse samples would further consolidate the structural validity of the scale. Longitudinal and cross-cultural designs would also enhance understanding of how school leaders' social media use evolves over time and across educational systems.

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Examining the Perceptions of the Assistant Principal as an Instructional Leader

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ABSTRACT

This study investigated assistant principals' self-perceptions of their role as instructional leaders and examined the corresponding perceptions of principals. Grounded in Weber's (1996) instructional leadership model and using the Principal Instructional Management Rating Scale (PIMRS), this quantitative study surveyed assistant principals and principals from a large suburban district. Findings reveal a gap: assistant principals rated themselves higher in instructional leadership than their principals. The results indicate that the assistant principal role requires a clearer definition, targeted professional development, and leadership succession planning. These findings offer implications for educational leadership training and school district practices.

Keywords: assistant principal, instructional leadership, principal, perception

The role of the assistant principal (AP) as an instructional leader is changing dramatically as school environments become increasingly complex and we demand greater academic success from our students. In common with other school leadership positions, APs are now expected to demonstrate a range of competencies, including interpersonal and strategic leadership, as well as a commitment to developing inclusive and supportive learning environments for all students (Hallinger et al., 2025). This shift highlights the important and challenging role the AP plays as a leader and resource for students and teachers. By committing to creating conditions that value educational success and community knowledge, the AP helps develop the school community (Shaked, 2019).

APs, once focused primarily on administrative and disciplinary tasks, now support instructional leadership in meaningful ways (Cansoy et al., 2021). Federal mandates such as No Child Left Behind (2001, 2002) and Race to the Top (U.S. Department of Education, 2009) have reshaped the educational landscape and leadership roles within schools, pressuring school leaders to take responsibility for student achievement, instructional quality, and school improvement (Grissom et al., 2021). However, despite this shift, the AP remains an underutilized resource in instructional leadership, often relegated to managerial responsibilities such as student discipline, logistics, and supervision (Somoza-Norton & Neumann, 2021).

A brief historical examination reveals that the assistant principalship originated in response to administrative demands as school populations grew in the late nineteenth century (Glanz, 1994). Initially, schools classified APs as "general supervisors" responsible for operations and "special supervisors" who supported teachers with instructional tasks. Over time, the distinction eroded, leaving most APs with administrative responsibilities and limited instructional influence (Hayes & Burkett, 2020). In modern schools, APs remain essential to day-to-day functioning but lack a clear pathway or preparation for engaging in the expected instructional leadership (Somoza-Norton & Neumann, 2021).

Problem Statement

APs play a vital role in school leadership, yet they often struggle with uncertainty regarding their responsibilities as instructional leaders. Research highlights that many APs experience a lack of clarity in their roles, insufficient training opportunities, and a significant gap between the expectations placed upon them and their actual practices (Hayes & Burkett, 2020). This disconnect significantly affects APs' professional growth and limits their ability to support both teachers and students effectively. Because of this disconnect, APs urgently need more structured guidance and accessible resources to thrive in their roles and make a meaningful contribution to the learning environment.

APs often view themselves as effective instructional leaders; however, they are frequently granted neither the time, authority, nor trust to fulfill that responsibility (Jackson et al., 2021). Principals and district leaders tend to determine the roles of APs according to site needs and produce variations in APs' acquisition of instructional leadership skills (Goldring et al., 2021). This misalignment is problematic, given that the AP role is intended to prepare future principals (NCES, 2022).

Moreover, the research literature provides limited empirical insight into how APs perceive their leadership and how principals perceive APs' readiness or ability to lead instruction. This study examines how APs perceive their instructional leadership skills and how principals view them in this role within a large suburban school district in the southern United States. To do so, the study uses four research questions:

- Research Question 1: How do assistant principals perceive their instructional leadership across the PIMRS domains of defining the school mission, managing instructional programs, and promoting a positive learning climate?
- Research Question 2: How do principals perceive assistant principals' instructional leadership across the PIMRS domains of defining the school mission, managing instructional programs, and promoting a positive learning climate?
- Research Question 3: To what extent do assistant principals' self-perceptions of instructional leadership differ from principals' perceptions across the PIMRS domains?
- Research Question 4: How do assistant principals' perceptions of their instructional leadership vary by years of experience across the PIMRS domains?

Understanding these perceptions is critical, as they influence leadership development, succession planning, and the cultivation of effective school leadership teams (Carpenter et al., 2021). When empowered as instructional leaders, APs effectively enhance teacher development, boost student achievement, and improve the overall quality of instruction in schools (Shaked, 2019).

LITERATURE REVIEW

Evolution of the Assistant Principal Role

Historically, APs have focused on running schools operationally and managerially, leaving instructional leadership behind. The assistant principalship as a profession first emerged towards the end of the nineteenth century, as schools began to struggle with the administrative demands of growing student populations (Glanz, 1994). As these new roles evolved, titles such as general supervisor and special supervisor emerged. These titles implied that some leaders managed the day-to-day school operations and others managed instruction. These titles phased out over time, leaving us with a title associated with discipline, logistics, and compliance (Hayes & Burkett, 2020).

Changes in expectations of what APs should know and be able to do have emerged from increased pressures for accountability and standards-based reform over the past few decades. Policies such as No Child Left Behind and Race to the Top spurred an increased emphasis on instructional quality and student achievement in schools (Grissom et al., 2021). School leadership roles have since been reimagined to focus heavily on holding schools accountable for student achievement by supporting instructional improvements and developing schoolwide initiatives to boost student learning (Grissom et al., 2021). Policies requiring APs to focus on improving instruction have increased expectations for APs to support both teacher and instructional improvement initiatives, as well as the development of schoolwide initiatives (Cansoy et al., 2021). However, research consistently shows that the AP position is used inconsistently and is often underutilized in instruction.

Role Ambiguity and Instructional Leadership Expectations

One common theme in many articles is the unclear role of the AP. While many anticipate that APs will serve as instructional leaders, they often lack the authority, time, or clear expectations to do so (Goldring et al., 2021). Principals

frequently decide the roles APs should take depending on campus needs. This allows for significant differences in APs' ability to take on instructional leadership roles across schools (Ho et al., 2021).

One reason for this disconnect between APs' beliefs about their ability to be instructional leaders and how they implement instructional leadership is this ambiguity. While APs may strongly believe in their ability to lead instruction, principals may still view them as managers of day-to-day operations (Jackson et al., 2021). This can make evaluation, mentoring, and succession planning difficult. It also inhibits APs from developing a strong leadership identity (Hayes & Burkett, 2020).

Preparation, Mentorship, and Professional Development of Assistant Principals

Research also identifies gaps in formal training and preparation, as well as in professional learning experiences specific to instructional leadership for APs. Most APs report receiving little to no training in leading curriculum, instructional coaching, or using data to inform decision-making before taking on their roles (Somoza-Norton & Neumann, 2021). Much of the way APs learn to lead instruction occurs through informal learning opportunities, such as on-the-job training or trial and error (Hayes & Burkett, 2020).

Researchers note that AP professional learning experiences should intentionally focus on adult learning communities, developing proficiency in leading teachers, and establishing distributed responsibility rather than directing and supervising teachers (Cohen & Schechter, 2019). Mentoring frameworks and formalized induction programs show promise for helping APs grow as instructional leaders when paired with research-backed instructional practices. When professional learning opportunities are not strategically designed, APs can struggle to translate their leadership goals into practice (Jackson et al., 2021).

Instructional Leadership Frameworks and Distributed Leadership

Models of instructional leadership provide a necessary framework when defining AP responsibilities and outlining practice. Weber's (1996) instructional leadership model consists of five domains: establishing the school mission, managing curriculum and instruction, fostering a positive school learning climate, monitoring/evaluating instruction, and evaluating the instruction program. These five leadership areas are similar to those in the literature on leadership and school improvement (Munna, 2021).

One specific tool based on Weber's (1996) model is the Principal Instructional Management Rating Scale (PIMRS), developed by Hallinger and Murphy (1985). The scale breaks down instructional leadership practices into observable behaviors within three categories: setting the school mission, managing the instructional program, and developing a positive school climate. Studies based on PIMRS have shown promise as an evaluation tool, showing high-performance leadership practices and differences between perceived leadership needs and current leadership practices (Hallinger et al., 2025).

Distributed leadership theory also serves as an effective supplement to instructional leadership theory by emphasizing collective accountability and aligned leadership teams (Phillips et al., 2023). By placing APs as leaders on the administrative team rather than bystander leaders, schools can align school operations with instructional initiatives and focus on continuous improvement (Hayes & Burkett, 2020). For distributed leadership to run smoothly, schools must establish roles, build trust, and evaluate performance.

Gaps in Literature

Research on APs is growing but remains sparse. For example, only a handful of empirical studies have directly compared APs' self-perceptions of instructional leadership behaviors with principals' perceptions of those behaviors using the same validated instrument. Further, few studies have investigated how years of experience impacted these perceptions or closed the perception gap between APs and principals.

Previous research has offered several qualitative recommendations, including clearer roles, targeted professional development, and aligned leadership pipelines that reflect instructional leadership models. Quantitative data on perception alignment within the same school district remain limited. Closing these research gaps can better inform practices in leadership preparation, evaluation, and succession planning.

The present study addresses this gap by exploring APs' and principals' perceptions of instructional leadership within the various PIMRS domains in one large suburban district. Additionally, this study compared self-ratings to external ratings and explored experience as a factor. This research provides empirical data on APs' instructional leadership capacity and the conditions needed to foster their development.

METHOD

Research Design

The purpose of this study was to investigate the self-perceived instructional leadership of APs and compare this to the perspective of their principals. This study used a descriptive quantitative design and the PIMRS to measure the effectiveness of school leadership. The PIMRS was selected because it systematically assesses leadership practices related to articulating the school's mission, managing curriculum and instruction, and developing a supportive learning environment (Hallinger et al., 2020). Knowledge of these areas is necessary to fully appreciate the roles of APs in developing successful educational environments.

The PIMRS is a 50-item Likert-scale questionnaire intended to measure the frequency and quality of leadership behaviors as perceived by principals and APs. The PIMRS instrument was selected for the present study because of its widespread use in educational leadership and its demonstrated validity and reliability. As the assistant principalship increasingly shifts its attention to instructional leadership, measuring the match between self-conception and external perceptions is critical to understanding how effective the leader is in their role (Hallinger et al., 2020).

The research instrument was intentionally designed to capture a quantitative comparison of how an AP self-perceives and how the principal perceives the AP, and to determine any difference based on specific demographic data, such as years of teaching experience. In addition, the research aimed to identify and explore how differences between APs' perceptions and principals' perceptions affect school culture and leadership.

Participants

The district selected for this study employs about 16,333 individuals, including 416 campus administrators. Principals average 7.6 years of experience, while APs average 6.6 years, both inside and outside the district (*Texas Education Agency - 2022–23 Texas Academic Performance Reports*, 2022). The study included 84 school leaders from a suburban district: 43 APs and 41 principals. Purposive sampling was employed to ensure representation across elementary to high school levels, enabling the selection of participants who could provide valuable insights into AP leadership behaviors. This approach ensured a diverse mix of professional experiences and backgrounds among the participants.

The APs were selected based on their experience, role, and length of time in the district to ensure a range of perspectives. This diversity allowed exploration of the impact of professional experience and perceptions of instructional leadership. Raters were site principals due to their familiarity with the APs and their leadership assessment practices. Principals from various educational levels were included to offer diversity and variety in the study's findings. Principals were contacted via district email and asked to nominate two APs from their campuses to ensure familiarity between raters and participants.

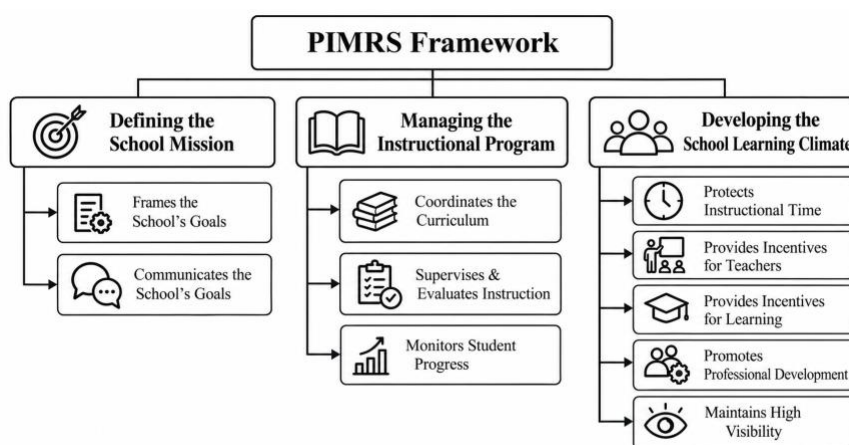
Survey Instrument

The PIMRS (Hallinger & Murphy, 1985) was used for data collection across three dimensions: defining the school's mission, managing the instructional program, and creating a favorable school climate (Ahmad et al., 2025). These three dimensions include domains such as communicating the school's goals, monitoring student progress, supervising and evaluating instruction, and promoting professional development (see Figure 1). By analyzing these domains, the researcher assessed instructional leaders' effectiveness and their role in creating supportive learning environments.

APs and principals distributed the PIMRS to research participants to collect their insights about instructional leadership. APs assessed their leadership behaviors, whereas principals evaluated the leadership behaviors of APs. The research design enabled analysis of self-evaluations and external evaluations to reveal differences or similarities in perceptions between the two groups. The goal was to identify areas where APs may benefit from additional support or development based on their perceptions of themselves and their principals.

Validity and Reliability

Multiple studies, including those by Hallinger et al. (2025), have established the validity of the PIMRS instrument. These studies provided evidence of its construct validity and criterion-related validity. The instrument has been extensively used in educational leadership research and is reliable for measuring the instructional leadership behaviors of principals and APs.

Figure 1***Instructional Leadership Domains (PIMRS)***

Note. The instructional leadership domains in the PIMRS assessment come from Hallinger et al. (2025).

The reliability of the PIMRS was confirmed by internal consistency using Cronbach's alpha. Previous research has consistently demonstrated strong reliability of the instrument, with alpha coefficients typically ranging from .80 to .90, indicating high internal consistency across subscales (Hallinger & Murphy, 1985).

Ethical Considerations

This study received ethical clearance from the Hampton University Institutional Review Board (IRB). The protocols followed ethical standards issued by the IRB to protect the participants' rights. Informed consent was obtained from all study participants. After being fully briefed, participants were informed that they could withdraw from the study without repercussion. The research team collected participant data through confidential means, maintaining participant privacy by anonymizing all responses. The data collected during the study were transferred into an electronic file for secure storage to maintain participant privacy.

Data Collection

The Qualtrics survey platform was employed to collect data as it supported anonymous survey distribution and completion. Qualtrics enabled a smooth data collection process by providing participants with a secure, user-friendly platform to submit their responses. The study team extended invitations to 90 principals, who each chose two APs to complete the survey. This sampling method enabled participation from a diverse set of APs with varied professional backgrounds and leadership positions across multiple school levels.

A total of 43 APs and 41 principals completed the surveys. Of the 90 principals invited to participate, 41 responded, representing a principal response rate of 45.6 percent. The survey responses provided data to examine and compare APs' self-perceptions of instructional leadership with principals' perceptions of APs' instructional leadership practices. The respondents were sent the survey link to their emails, which took them to the survey's online portal to minimize access difficulty. All respondents were asked to respond within two weeks. Reminder emails were sent as a follow-up to maintain motivation and get timely feedback from the members. To minimize the time commitment required of participants, the questionnaire was administered online and took approximately 15 minutes to complete.

Data Analysis

The data collected from the PIMRS surveys were analyzed using SPSS statistical software version 28. Descriptive statistics were initially used to summarize the sample's demographic characteristics and describe the overall response

patterns. Inferential statistical analyses, including one-way ANOVA, were conducted to compare the perceptions of APs and principals on individual items within the domains of instructional leadership.

Additionally, the data were analyzed across multiple demographic indicators, such as experience, for APs and principals to determine whether experience influenced their perceptions of instructional leadership. This analysis was important as it enhanced our understanding of how professional experience influenced the perceptions of instructional leadership among APs and principals.

RESULTS

The primary aim of this study was to examine the self-perceptions of APs regarding their role as instructional leaders and compare these perceptions with the perceptions of principals about their APs' instructional leadership abilities. This section presents findings related to the study's research questions. The data analysis presents self-reported data from APs and data provided by principals, offering insights into alignment and discrepancies between the two groups' perceptions.

Research Question 1

How do assistant principals perceive their instructional leadership across the PIMRS domains of defining the school mission, managing instructional programs, and promoting a positive learning climate?

APs perceived themselves as frequently engaging in instructional leadership practices on all three domains of PIMRS. Table 1 shows that the mean self-rating scores ranged from 3.83 to 4.05 on the five-point Likert scale for all PIMRS subscales. APs perceived themselves as frequently effective at defining mission, managing instructional programs, and developing a positive school learning climate.

Table 1

Descriptive Statistics for PIMRS Instructional Leadership Functions

PIMRS Function	<i>M</i>	<i>SD</i>	Frequency Rating	Interpretation
Defining the School's Mission	4.05	0.78	Frequently to Almost Always	APs report consistently articulating a clear vision and mission aligned with campus goals.
Managing the Instructional Program	3.94	0.76	Frequently to Almost Always	APs indicate frequent communication of goals to teachers, students, and stakeholders.
Promoting a Positive Learning Climate	3.83	0.54	Frequently	APs regularly use student-performance data to align instructional decisions with school goals.
Overall Mean*	3.91	0.59		APs perceive themselves as highly effective in defining and communicating the school's mission.

Note. Values represent mean scores on the five-point Likert scale (1 = Almost Never, 5 = Almost Always). *Overall mean computed across all items

Research Question 2

How do principals perceive assistant principals' instructional leadership across the PIMRS domains of defining the school mission, managing instructional programs, and promoting a positive learning climate?

Principals' ratings of APs' instructional leadership skills varied across the three functions of managing the instructional program. Table 2 shows principals rated a moderate to frequent number of observed instructional leadership behaviors, with supervising and evaluating instruction receiving the highest rating and coordinating the curriculum and monitoring student progress receiving lower ratings. This suggests principals felt APs were more involved in supervising instruction but were less involved in other areas, such as monitoring student progress.

Table 2

Principals' Perceptions of Assistant Principals' Instructional Leadership Across PIMRS Domains

PIMRS Function	<i>M</i>	<i>SD</i>	Frequency Rating	Interpretation
Supervise and Evaluate Instruction	4.15	0.75	Frequently	Principals report that APs provide some instructional feedback but less consistently across classrooms.
Coordinate the Curriculum	3.60	0.99	Frequently	Principals perceive limited involvement of APs in aligning curriculum across grade levels and content areas.
Monitor Student Progress	3.30	1.00	Occasionally to Frequently	Principals observe APs regularly reviewing student performance data, though less strategically than principals.
Overall Mean (Instructional Program Domain)	3.68	0.82	Frequently	Principals perceive moderate engagement of APs in instructional program management, below APs' self-ratings.

Note. Values represent mean scores on the five-point Likert scale (1 = Almost Never, 5 = Almost Always).

Research Question 3

To what extent do assistant principals' self-perceptions of instructional leadership differ from principals' perceptions across the PIMRS domains?

Because the 43 assistant principal self-assessments and 41 principal assessments were independent and unpaired, a one-way ANOVA was used for between-group comparisons. Table 3 presents four selected PIMRS items, calculated from the complete survey exports. These item-level findings should not be interpreted as evidence that every PIMRS domain differed significantly.

Table 3

One-Way ANOVA Comparing Assistant Principals' and Principals' Ratings on Selected PIMRS Items

PIMRS Domain	Assistant Principal <i>M</i> (Self-Rating)	Principal <i>M</i> (Rating AP)	<i>M</i> Difference	<i>F</i> (1, 82)	<i>p</i>	Interpretation
Review student work products	4.12	3.37	0.75	12.76	<.001	APs reported reviewing student work products significantly more frequent than principals reported observing.
Cover classes until substitute arrives	3.74	2.98	0.76	6.91	.010	APs reported covering classes until a substitute arrived significantly more frequently than principals reported observing.
Compliment teachers privately	4.67	4.34	0.33	3.92	.051	APs reported complementing teachers privately more frequently than principals reported observing; however, the difference was not statistically significant.
Recognize student achievement	3.79	3.15	0.64	6.86	.011	APs reported recognizing student achievement or improvement significantly more frequently than principals reported observing.

Note. Scores use a five-point frequency scale. The tests compare independent groups (43 assistant principals and 41 principals). *F* statistics and *p*-values were calculated from the complete Qualtrics exports. These are selected item-level comparisons, not domain-wide significance tests.

Research Question 4

How do assistant principals' perceptions of their instructional leadership vary by years of experience across the PIMRS domains?

APs' self-perceptions of their instructional leadership slightly differed by years of experience. Table 4 shows that APs' mean self-rating scores varied across the five experience categories, with no consistent increase in ratings as years of experience increased. Additionally, years of experience did not result in statistically significant differences in APs' perceived instructional leadership, $F(4, 38) = 0.88, p = .487$.

Table 4

Assistant Principals' Self-Perceptions of Instructional Leadership by Years of Experience

Experience	<i>N</i>	<i>M</i>	<i>SD</i>	Interpretation
1 year (Novice APs)	6	4.04	0.51	Perceive themselves as effective but still developing consistency in instructional leadership behaviors.
2-4 years (Developing APs)	12	3.78	0.56	Report developing confidence in defining the school mission and managing instruction.
5-9 years (Mid-level APs)	12	3.74	0.68	Perceive themselves as engaged in instructional leadership practices, with opportunities for continued growth.
10-15 years (Experienced APs)	11	4.15	0.48	Report strongest sense of self-efficacy and impact on instructional practices.
More than 15 years (Veteran APs)	2	3.93	1.20	Report frequent engagement in instructional leadership practices.
Overall Mean	43	3.91	0.59	APs generally perceive themselves as frequently engaging in instructional leadership practices, regardless of years of experience.

Note. Mean scores are based on assistant principals' PIMRS self-ratings. All values were measured on a five-point Likert scale (1 = Almost Never, 5 = Almost Always). Experience categories reflect the survey response options. The group with more than 15 years of experience included only two respondents and should be interpreted cautiously.

Summary of Findings

Overall, the results showed differences between how APs perceive their instructional leadership and how principals evaluate it. APs generally reported frequent engagement in instructional leadership practices across the PIMRS domains, whereas principals reported varying frequencies of observed instructional leadership behaviors. Experience appeared to have no consistent effect on APs' self-perceptions, while its effect on principals' ratings was not examined. The data underscore the continuing need to clarify the AP's role, ensure equitable opportunities for instructional leadership, and strengthen professional development aligned with Weber's (1996) instructional leadership model.

DISCUSSION

Emerging Findings

The results of this study validate what many have long perceived: a gap between APs' and principals' perceptions of instructional leadership. This study goes further by quantifying the difference between how one views oneself and how others view them within the same theoretical framework. Based on Weber's (1996) instructional leadership model and measured by the PIMRS, these findings help explain what instructional leadership means, how it is carried out, and what may limit APs' ability to engage in instructional leadership within their roles. Quantitative data were used to compare principals' and APs' perceptions of overlapping instructional leadership domains, adding to the body of knowledge on role ambiguity, leadership preparation, and distributed leadership.

Considered alongside prior research, these results point to two broader issues: role ambiguity and the need for targeted professional development.

Role Ambiguity

These results may reflect the role ambiguity documented in prior research, in which administrative and disciplinary duties overshadow instructional priorities (Hayes & Burkett, 2020). APs rated themselves highly in instructional leadership, particularly in defining the school's mission, yet principals rated them lower on several items. This misalignment suggests that organizational culture and principal-determined role boundaries may shape APs' opportunities to lead instruction (Hayes & Burkett, 2020). Addressing role ambiguity may require a clearer definition of AP responsibilities and shared leadership frameworks that empower APs to engage in instructional improvement (Moyer & Goldring, 2022).

Targeted Professional Development

APs and principals both indicated a need for professional development focused specifically on instructional leadership. Most preparation programs prioritize management over instructional practice, leaving APs to develop leadership skills through on-the-job learning. This aligns with findings by Cohen and Schechter (2019) and Jackson et al. (2021), which highlight the importance of differentiated professional development. Within Weber's (1996) framework, APs require growth in managing curriculum and instruction, while Bandura's (1986) self-efficacy theory suggests that structured mentorship can help translate leadership confidence into observable practice.

Together, these results suggest that APs need role clarity, professional learning, and systemic support to transition from operational managers to instructional leaders capable of advancing school improvement.

Comparisons with the Literature and Theoretical Framework

This study's findings both align with and extend existing literature on the AP role in instructional leadership. Consistent with the literature, APs in this study perceived themselves as competent instructional leaders across Weber's (1996) domains of defining the mission, managing instructional programs, and promoting a positive learning climate, while principals' ratings were notably lower. This perception gap echoes findings by VanTuyle (2018) and Lim and Pollock (2019), who described the AP as a "leader in waiting" constrained by administrative tasks and unclear authority. Selected PIMRS items showed statistically significant differences between the independent AP and principal groups; these item-level tests do not establish significant differences across entire PIMRS domains. These results align with Goldring et al. (2021) and Somoza-Norton and Neumann (2021), who found that principals often view APs as more operational than instructional.

Research continues to show that APs' instructional leadership capacity is limited by site-level expectations, restricted authority, and inconsistent professional development (Hayes & Burkett, 2020; Jackson et al., 2021). This study's findings reinforce this trend—APs reported frequent engagement in instructional leadership practices, while principals' ratings reflected varying frequencies of observed instructional leadership practices. However, this study diverges from previous research by showing that years of experience did not consistently enhance APs' self-perceived instructional leadership (findings for research question 4). Unlike Cohen and Schechter (2019), who found little correlation between experience and leadership confidence, this study found no consistent increase in APs' self-ratings across experience groups. These findings suggest that perceptions of instructional leadership may depend on factors beyond years of experience, including communication and organizational culture.

Weber's (1996) instructional leadership model, with its five domains, provides a lens to interpret these results. While this study measured three related dimensions using the PIMRS, engagement appeared uneven, particularly in principals' ratings. Principals rated APs highest in supervising and evaluating instruction but lower in coordinating the curriculum and monitoring student progress. APs' self-ratings were more consistent, ranging from 3.83 in promoting a positive learning climate to 4.05 in defining the school's mission. The imbalance in principals' ratings supports Bhengu et al. (2014), who asserted that without shared leadership structures and empowerment, APs struggle to enact Weber's model holistically.

Integrating Bandura's (1986) social cognitive theory further explains this pattern. APs' high self-perceptions suggest strong self-efficacy, yet organizational barriers—such as principal control, limited authority, and excessive managerial duties—restrict opportunities to demonstrate instructional leadership. This bridge between Weber's and Bandura's frameworks shows that while APs have the motivation and conceptual understanding to lead instructionally, contextual constraints prevent them from fully realizing these behaviors.

This study contributes to the evolving discourse by quantifying the perception gap between APs and principals, situating it within a robust theoretical framework, and aligning with recent scholarship advocating for structured mentorship, targeted professional development, and distributed leadership (Cohen & Schechter, 2019; Hayes & Burkett, 2020). The

findings also reaffirm Hallinger and Murphy's (1985) argument that leadership effectiveness depends on coherence among beliefs, behaviors, and expectations within school hierarchies.

In summary, while APs perceive themselves as instructional leaders aligned with Weber's model, principals continue to evaluate them primarily through an operational lens. Addressing this misalignment requires aligning leadership preparation, evaluation systems, and professional learning to reinforce shared instructional responsibility. By connecting the findings to both Weber's and Bandura's theories, this study underscores the need to clarify and strengthen the AP's instructional leadership role as a critical component of school improvement.

IMPLICATIONS

This study's results have critical educational leadership implications, especially for developing the AP's instructional role. The enduring perception gap between APs and principals underscores the importance of clarity and specificity of expectations, focus on professional learning, and deliberate mentorship in accord with Weber's (1996) instructional leadership model.

Districts must articulate the instructional aspect of leadership for APs and ensure that principals and APs have a common understanding of those expectations. Setting up mutual leadership frameworks can help close perception gaps, improve collaboration, and better distribute instructional authority. Professional development efforts should also extend beyond management functions to teach curriculum leadership, coach teachers, and empower data-informed pedagogical decision-making. Integrating mentorship, reflective practice, and peer-to-peer collaboration in AP training can reinforce self-efficacy, as theorized by Bandura's (1986) social cognitive theory, and encourage knowledge transfer into practice.

Lastly, structured leadership pipelines must align with all five of Weber's domains—defining mission, managing instruction, assessing programs, observing instruction, and promoting a positive climate—to best prepare APs for principalship. Improved preparation, mentoring, and evaluation systems will create greater school coherence, contributing to better student achievement.

Limitations of the Study

There are several limitations of the study. First, the results may not be generalizable beyond the district studied. However, the study achieved a 45.6% response rate. District-level factors, including demographics and policy context, may vary across regions. Therefore, while the results highlight the value of APs, further research is needed to generalize the findings across different settings.

A further limitation is that it relies solely on self-reported data from the APs and principals. APs may have overrated their leadership ability due to socially desirable responses, which may have led to subjective assessments from principals. Although the PIMRS is a validated instrument, self-reporting can be subject to bias. External raters, observer-based assessments, or peer assessments could be used to increase objectivity in future studies.

Relying solely on a survey instrument like PIMRS does not provide us with the complete picture of what APs do. While it sheds light on their leadership behaviors, it does not help us understand how APs juggle their roles as instructional leaders with their numerous administrative responsibilities. To better understand these experiences, we would benefit from more personal methods, such as in-depth interviews or focus groups, that let us hear their stories and gain insight.

This study focuses primarily on the experiences of APs and principals but overlooks valuable insights from teachers and other key stakeholders. Future research that incorporates a wider range of perspectives could significantly enhance our understanding of how effective APs are in guiding instruction. By adopting a more inclusive approach, we can better understand how APs play a vital role in creating effective learning environments.

CONCLUSION

This study underscores the importance of aligning perceptions of instructional leadership between APs and principals. The consistent differences in their evaluations reveal a need to better define expectations and create conditions that empower APs to lead instructionally.

When leadership roles are clearly delineated and supported through coaching and professional learning, APs can more effectively implement Weber's (1996) model and fulfill the instructional responsibilities envisioned for them. Building self-efficacy through mentorship and shared leadership experiences, as explained by Bandura (1986), transforms confidence into practice and enhances instructional capacity across schools.

Clarifying the AP's role is essential not only for individual growth but also for the collective success of school leadership teams. By aligning preparation programs, professional development, and evaluation criteria, districts can elevate the AP position from operational management to instructional influence—contributing directly to teacher development, student learning, and sustained school improvement.

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Rethinking “The 4” in Standards-Based Grading: Advanced Mastery, Standards Alignment, and Implications for K–12 Reporting

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ABSTRACT

Debates over the use of four-level scales in standards-based grading and reporting, particularly the meaning and necessity of the highest level, persist in K–12 education. This conceptual, practice-informed article examines whether “the 4,” commonly labeled *advanced mastery*, *exceeds*, or *extending*, is theoretically sound and instructionally useful within standards-aligned grading systems. Illustrative classroom scenarios demonstrate that students may produce exceptional work without exceeding the requirements of the standard being assessed. The article considers arguments for and against a top level that requires students to exceed the standard, and it distinguishes valuable qualities such as creativity, sophistication, and superior performance from evidence of standards attainment. Particular attention is given to the misapplication of Webb’s depth of knowledge framework as a proxy for mastery levels, clarifying the difference between cognitive complexity and quality of performance. The article recommends precise performance descriptors, moderation and calibration of student work, narrative feedback, student conferencing, and other approaches for recognizing excellence without distorting proficiency scales. It concludes that schools should initially use a three-level system focused on developing a shared understanding of proficiency. Additional levels may be considered later, following reflection, calibration, and analysis of implementation evidence.

Keywords: standards-based grading, advanced mastery, student achievement

A recurring question in standards-based grading and reporting reform is what to do with the top level, commonly represented by a 4 on a four-point progression. Should it exist at all? If it does, what exactly does it mean? When should it be conferred? And if a school still converts standards-based marks into letter or number grades, however ill-advised that may be, what should a 4 represent?

One commonly used standards-based grading structure uses labels looking something like the scale shown below:

4: ****

3: Meeting/Achieving

2: Progressing

1: Beginning

For the sake of argument, the label for the 4 is intentionally left blank. Schools label and use this level in many ways, so it is worth asking whether it is necessary before assuming what it should mean.

The central distinction this article explores is not between three-level and four-level scales. It is between two different uses of the four-level scale. In some systems, Level 4 is simply the point at which the standard has been met. In others, proficiency is represented by a 3, and the 4 is intended to mean something beyond the standard: *advanced mastery*, *exceeds*, *extends*, or some other version of *more than proficient* (Table 1).

In Table 1 below, the concern is the second scale usage: proficiency at Level 3. The problem is not the number 4 itself; it is what the grading system claims the fourth level represents. In such a scale usage, stakeholder concerns are common. Teachers worry about fairness, parents worry about recognition, and administrators worry about consistency. A grading system designed to simplify communication about learning can therefore become complicated at precisely the moment it should be clearest. This tension can show up in calibration meetings, report-card conferences, and policy revisions, where educators are asked to explain why a student who did something genuinely impressive still “only” met the standard.

Table 1***Two Common Uses of a Four-Level Scale***

Use of the Scale	Level 3 Label	Level 4 Label
Proficiency at Level 4	Approaching/Progressing	Meeting/Achieving
Proficiency at Level 3	Meeting/Achieving	Exceeds/Extending/Advanced Mastery

Scholars of grading have long argued that standards-based systems are, by design, criterion-referenced: Students are evaluated against defined learning standards rather than compared with one another (Brookhart et al., 2016). From this perspective, proficiency represents successful attainment of the standard itself. As Guskey (2014) argues, labels that imply performance beyond the standard—such as “exceeds”—introduce conceptual confusion by suggesting that the target is fixed and surpassable at the same time.

This article offers a conceptual, practice-informed analysis of that problem. It does not present original empirical findings or attempt a comprehensive review of the grading literature. Instead, it uses existing scholarship and illustrative K–12 classroom examples to examine whether a level beyond proficiency can be coherently defined within a criterion-referenced grading system and how schools might recognize exceptional work without distorting the purpose of standards-based reporting. The central argument is straightforward: Excellence is worth recognizing, but a standards-based grade may not always be the right place to encode it.

WHAT DOES IT MEAN TO EXCEED A STANDARD?

The first dilemma concerns what exactly we are measuring (Brookhart et al., 2016). Consider three real-life situations shown in Table 2, slightly truncated for clarity. In which of these situations has the student achieved *beyond* the expectation or at an *advanced mastery level*?

Table 2***Sample Student Responses to Standards***

Standard	Student Performance Description
<i>CCSS.ELA-LITERACY.W.6.1</i> Write arguments to support claims with clear reasons and relevant evidence. (National Governors Association Center for Best Practices & Council of Chief State School Officers [NGA & CCSSO], 2010)	Grade 6 student writing a persuasive essay on animal welfare used arguments dating back to Plutarch and a 1613 painting by Brueghel to make the case that this is not a recent trend or phenomenon. The student also cited multiple religious texts to supplement the scientific argument.
<i>CCSS.ELA-LITERACY.L.9-10.2</i> Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. (NGA & CCSSO, 2010)	Grade 10 student writes flawlessly, and their papers never contain errors in conventions.
<i>NGSS 3-ESS2-1 Earth's Systems</i> Represent data in tables and graphical displays to describe typical weather conditions expected during a particular season. (NGA & CCSSO, 2010)	Grade 3 student figured out how to use Google Sheets to create charts and graphs in an exploration of monthly average precipitation in dry and rainy seasons.

Below, consider educator arguments for and against a top level that requires students to exceed the standard, along with a parent argument.

The argument for: In each case, the student has demonstrated a high level of skill and intelligence that appears to go beyond the normal grade level. Since the standard is written for a grade level, the student has gone beyond that grade level and should be recognized as such. A second argument is that the student did something no one expected and should be recognized for it.

The argument against: The demonstration of higher intelligence is not part of the standard (Sadler, 1989). The question is whether the student meets the expectation. If the answer is yes, the standard has been met. Creativity, fluency, or sophistication may make the work exceptional, but those qualities are not automatically part of the criterion being assessed.

The parent's argument: "My child is a genius and needs to be celebrated!" This concern should not be dismissed. Recognition matters. The question is whether a proficiency score is the best instrument for providing that recognition.

Now, here are some commonly used definitions of when a student has gone beyond the expectations:

- They can teach it to others and have it make sense to them.
- They have done something unique and innovative that was not assisted by an adult.
- They made a contribution that furthered the teacher's own evaluation of the expectation (e.g., they "set the curve").

At the core of standards-based grading is the idea that standards define the learning expectations that students are responsible for meeting. In a criterion-referenced system, the judgment is independent of how other students perform (Brookhart et al., 2016). A veteran teacher may occasionally encounter a student whose work is unusually impressive, but the evaluation still must return to the evidence and the criteria. Otherwise, *advanced* risks becoming a judgment about how remarkable the student appears compared to other students rather than how the student performed against the standard.

The second dilemma is whether a category labeled *advanced mastery* or *extending* can exist at all (Sadler, 1989). It is like the old joke that one cannot be "a little bit pregnant." In this context, you either meet the standard or you don't. However, this does not mean performance against a standard cannot vary in quality. Rubrics can and do distinguish degrees of quality within defined criteria. The problem arises when the highest category requires students to demonstrate something outside the standard itself. After all, no standard says, "Student can solve quadratic equations and teach it to others," or "Student will demonstrate correct subject-verb agreement in such a way that it makes the teacher reconsider whether they are even needed in the classroom anymore."

A familiar bicycle analogy can further illuminate this problem, as shown in Table 3. In this case, riding independently represents meeting the standard (Level 3). To reach Level 4, the rider pops a wheelie, jumps ramps, and performs stunts. It is memorable and easy to explain to families. However, it also changes the task. The student is no longer simply demonstrating the original standard at a higher quality; the student is doing something additional.

Table 3

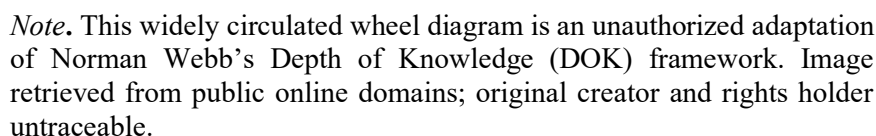
The Bicycle Analogy: Rubric Criteria and the "Extending" Problem

Level	Label	Descriptor
4	Extending	You can ride a bike by yourself and also do jumps, wheelies, and other stunts.
3	Achieving	You can ride a bike by yourself with no assistance.
2	Approaching	You can pedal and stay upright, but you need assistance.
1	Beginning	You have not mastered the basics, such as pedaling, turning, and balancing.

This analogy has been adapted to swimming, hiking, baking, and even swinging ("I can swing fast and high") to better explain the *extending* level of a four-point grading scale. These versions make the progression intuitive, but they are less useful when evaluating conventions in English or problem-solving in mathematics. An IB rubric for Spanish Language A, for example, can distinguish between ideas being "well organized" and "adequately organized" (International Baccalaureate, 2023). That is a difference in quality against defined criteria. It is not necessarily the same thing as going beyond the standard.

The confusion is reinforced by the widely circulated “DOK Wheel,” an educator-created visualization based on Webb’s work (Figure 1). Webb and colleagues have distanced the framework from this wheel because assigning verbs to fixed DOK levels can create precisely the kind of distortion at issue here (Webb et al., 2023).

The Misleading “DOK Wheel”



If the standard being assessed uses a DOK level 4 verb, and a student meets it and then demonstrates additional, deeper understanding, that could support awarding advanced mastery. Similarly, a standard requiring a DOK level 2 verb like “classify” could justify recognizing an additional advanced mastery if a student not only classifies but also proposes new or synthetic groupings based on other perceived similarities (Brookhart, 2010).

DOES “EXCEEDS” SERVE A USEFUL PURPOSE?

A classic argument for the top level of a scale allocated to achievement beyond the standard (however named) is the need to recognize excellence and maintain motivation for high-performing students. Student conferencing is a useful tool in a grading system that recognizes advanced mastery. Through direct discussions, teachers can assess whether a student's performance goes beyond the standards. This method is more effective when clear grade descriptors are established, allowing students to demonstrate how they meet specific criteria independently and consistently.

However, showcasing student excellence doesn't require adding an additional performance level above the standard. Instead, teachers can directly communicate outstanding achievements to parents through emails, notes, or postcards home. Additionally, recognizing students in award assemblies and through external competitions like math or debate contests can further highlight their talents. Teachers can also document these accomplishments in a growing portfolio that students can use in the future (Guskey & Bailey, 2010).

In high school, recognition matters for university applications. While many student applications feature high GPAs and impressive titles, schools can also provide a school profile that highlights a school's unique grading system, such as valuing *meeting the standard* as the top achievement. As many schools move away from class ranking (Strauss, 2016), this approach becomes increasingly relevant.

Finally, the importance of report card comments should be emphasized. These comments, often a challenge for teachers and parents, can play a crucial role in university applications, offering a personalized showcase of a student's excellence. When used effectively, these comments can convey achievements and abilities in a meaningful way, adding depth to the student's academic profile.

WHAT COULD BE DONE INSTEAD OF “EXCEEDS”?

Recognizing excellence does not require pretending that exceptional work never happened. It requires choosing the right tool for the message. As mentioned earlier, schools have a variety of methods to recognize high achievement, many of which are often more meaningful and personal to the student and their families than a simple designation of extending, exceeds, or advanced mastery.

But there is also a simple option that often gets lost in the debate: Retain four levels, but make Level 4 the point at which the standard is met. A scale might start at beginning and move to progressing, approaching, and meeting. This preserves four reporting categories without requiring the system to define a mysterious space beyond proficiency. When this option is chosen, the design question becomes not whether a school uses three levels or four, but whether the scale clearly communicates each level it claims to measure.

To ensure consistent expectations for each level of the scale, mentoring new teachers is crucial. All teachers, including veterans, should collaborate to review student work objectively through the process of moderation. This process, involving the entire faculty, specific departments, or peer mentorship, helps in identifying true excellence in student performance (Guskey, 2017).

COUNTERARGUMENTS AND RECOMMENDATIONS

Arguments for the *extending*, *exceeds*, or *advanced mastery* level generally emphasize recognition, alignment with GPA conversion systems, or its usefulness as a reward. These arguments are not trivial. Recognition matters, conventional GPA systems may create practical constraints, and schools reasonably want high-performing students to remain challenged. The question is whether those concerns require a performance level beyond the standard or whether they can be addressed through other parts of the reporting system.

This article strongly recommends initially implementing a standards-based learning, grading, and reporting system that includes only criteria for meeting the standard, without additional levels for exceeding it. Although it might not be immediately popular, this approach is crucial to ensuring faculty, students, and parents fully understand what meeting the standard entails. Implementing this system without additional levels at the start prevents the complication of having to defend decisions as to why a student is achieving at Level 3 rather than Level 4.

This foundational period allows everyone involved to gain a clear and solid understanding of the system's expectations. After an initial implementation period (approximately 1–2 years), once there is collective recognition of what truly constitutes performance that goes above and beyond the standard, and how frequently it occurs, the discussion can shift to whether and how to integrate a higher level into the system. This phased approach helps in gradually acclimating all stakeholders to the system and in making informed decisions regarding *what to do about that 4*.

CONCLUSION

At first glance, the debate about “the 4” can look like a technical question about scales, but it is really a question about the purpose of grading. If a standards-based grade is intended to communicate whether a student has met a defined expectation, then every level in a grading scale must have an equally clear meaning. Schools should absolutely recognize creativity, sophistication, independence, and exceptional achievement. The question is not whether those qualities matter. The question is whether assigning a higher number is the clearest and most defensible way to communicate these accomplishments. Before adding a level beyond proficiency, schools should be able to explain exactly what it measures, why it belongs in the grading scale, and how educators will identify it consistently. If they cannot, meeting the standard may be enough.

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Collective Leadership for Equitable Instruction: Strategies and Impacts Across K–12 Schools

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ABSTRACT

This study investigated how school leadership teams drive equity-centered instructional practices in K–12 schools. It aimed to synthesize contemporary research to identify leadership behaviors, structures, and conditions that contribute to equitable student learning environments. This qualitative literature review examined 10 peer-reviewed empirical studies published between 2019 and 2025. Studies were selected based on their focus on instructional leadership, equity, and K–12 educational contexts. A thematic analysis was used to identify recurring patterns and strategies across the literature. Five major themes emerged: (1) inclusive leadership that fosters shared decision-making and relational trust; (2) equity-focused leadership pipelines that prepare leaders to identify and address systemic barriers; (3) equity-oriented data practices that contextualize academic metrics and inform instructional change; (4) culturally responsive instruction supported by school-wide professional learning; and (5) collaborative leadership that centers family and community engagement. These themes were reinforced across studies involving varied contexts and leadership roles. The review was limited to studies published in English and focused primarily on U.S. educational contexts. Districts and policymakers can use these findings to design leadership preparation programs, refine professional development strategies, and align accountability frameworks with equity goals.

Keywords: collective leadership, equitable instruction, K-12 schools, equity-centered instructional practices, academic outcomes

In contemporary K–12 education, school leadership teams play an essential role in advancing equity-centered instructional practices. These teams—typically composed of principals, instructional coaches, teacher leaders, and support personnel—are uniquely positioned to influence teaching and learning through shared decision-making, distributed leadership, and a strong commitment to inclusive excellence (DuFour & Marzano, 2011). Rather than working in isolation, effective teams operate as learning communities that actively interrogate instructional practices and ensure every student has access to high-quality, culturally responsive learning experiences (Senge et al., 2012).

Addressing inequities in student achievement requires moving beyond surface-level reforms and adopting strategies that disrupt systemic marginalization. Research has shown that when instructional practices are tailored to the lived experiences of racially, culturally, and linguistically diverse students, academic engagement and performance improve (Johnson et al., 2023). Leadership teams that create cultures of high expectations, trust, and collaboration among staff foster collective teacher efficacy—a strong predictor of student success (Goddard et al., 2000). These environments are further enhanced when instructional practices align with asset-based perspectives and affirm students' identities (Theokas et al., 2019).

Equity-focused leadership teams embrace continuous learning, critically analyze data, and disrupt tracking systems that reproduce inequality (Johnson et al., 2017; Oakes, 2005). Their work is grounded in evidence-based strategies shown to impact learning at scale, including formative assessment, teacher clarity, and instructional feedback cycles (Marzano, 2003). This study synthesizes recent empirical findings to examine how school leadership teams are enacting these practices in

real-world settings. The purpose of this study was to investigate how school leadership teams drive equity-centered instructional practices in K–12 schools. It aims to synthesize contemporary research to identify leadership behaviors, structures, and conditions that contribute to equitable student learning environments. This study's guiding research question was: *How do school leadership teams cultivate equity-centered instructional practices that improve academic outcomes for historically underserved K–12 student populations?*

LITERATURE REVIEW

Collective Leadership in Education

Collective leadership represents a paradigm shift from the traditional hierarchical model, fostering environments where knowledge and expertise are shared and enhancing overall performance (Hickey et al., 2022). Social learning theory, systems theory, and social constructionism provide a theoretical underpinning that collectively highlight collective leadership as a co-constructed phenomenon rather than a solitary role (Nadeem, 2024; Sachar, 2025). Social learning theory emphasizes that learning occurs through social interactions, suggesting that leadership skills can be developed collectively (Nadeem, 2024). Systems theory views organizations as complex systems in which leadership emerges from member interactions, promoting a holistic approach to leadership (Sachar, 2025). Social constructionism argues that leadership is constructed through social processes, allowing for diverse contributions from all members (Sachar, 2025).

The distinctions between collective leadership, instructional leadership, and traditional hierarchical leadership are significant, reflecting different approaches to governance and decision-making in educational settings. Traditional hierarchical leadership emphasizes control and compliance, thus prioritizing administrative efficiency over collaborative engagement (Li, 2024). While instructional leadership retains a hierarchical structure, it encourages collaboration among educators to achieve shared objectives (Noman, 2023). The collective leadership model can be seen in practices that distribute leadership roles across the school community, enhancing engagement and inclusivity (Eyong, 2024).

Collective leadership in education is conceptualized through various models and frameworks, notably Spillane's distributed leadership and Leithwood's transformational leadership. Leadership in education is not confined to formal leaders; it is distributed among all members of the organization, including teachers and students (Harris et al., 2022). The distributed leadership framework fosters teacher empowerment and collaborative efforts in the education sector, which can improve student outcomes and school effectiveness (Sachar, 2025). Leithwood's transformational leadership model focuses on how individuals interact within specific contexts, such as the education sector, highlighting the importance of both formal and informal leadership roles (Li, 2024). These frameworks offer valuable insights into collective leadership, and integrating them can create a more inclusive and effective educational environment.

Equitable Instruction in K–12 Education

Equitable instruction in K-12 education involves a range of strategies that are aimed at ensuring all students have access to high-quality learning experiences. This approach is characterized by inclusivity, cultural relevance, and student empowerment, which collectively foster a learning environment for diverse populations (González, 2025; Lotan, 2022; White et al., 2024). An inclusive, welcoming environment involves recognizing and celebrating diversity within the classroom (González, 2025). Empowerment and agency are crucial for fostering a positive learning experience for students (White et al., 2024). Equitable access to resources is also vital to level the playing field in diverse classrooms (Lotan, 2022).

Culturally Responsive Pedagogy (CRP) and Universal Design for Learning (UDL) are key pedagogical approaches that promote equity and enhance accessibility, resonating with students from diverse cultural backgrounds. CRP emphasizes the importance of incorporating students' cultural backgrounds into the curriculum, thus leading to students' engagement and performance (Stembridge, 2019). Stembridge (2019) adds that teachers should adapt lesson plans to reflect students' cultural contexts and use diverse teaching materials. On UDL, Cressey (2020) stated that it provides a framework for designing educational experiences that accommodate individual learning differences, thus minimizing barriers to learning. Alarcón and Pineda (2024) state that UDL promotes flexibility in teaching methods and materials by allowing educators to tailor their approaches to meet varied student needs. Strickland et al. (2023) argued that integrating UDL with CRP can improve instructional effectiveness by addressing both accessibility and cultural relevance. These approaches are vital for promoting equity in K-12 education by addressing teacher preparedness and systemic barriers within educational institutions.

Equitable instruction in K–12 education faces numerous challenges and barriers, particularly in diverse settings. Urban schools often lack the resources available in suburban counterparts, leading to significant achievement gaps and indicating institutional inequities (Glass et al., 2023). Staff biases and culturally limited policies hinder equitable access to education

for racial minorities (Marshall, 2024). Regarding access to resources, many students, particularly those from marginalized backgrounds, do not receive high-quality science instruction (Jones & Burrell, 2022). In terms of race, Black and Hispanic students face greater structural barriers in accessing computers and computer science education compared to their White peers (Wang & Hejazi Moghadam, 2017). Overcoming these systemic barriers is critical in creating resilience among students from marginalized backgrounds.

The Role of Collective Leadership in Promoting Equitable Instruction

Collective leadership plays a pivotal role in promoting equitable instruction by fostering collaboration among educators, families, and communities. Collaboration among educators, parents, and the community can enhance support for equity-oriented initiatives, leading to student success (Leithwood, 2021). Instructional leadership teams serve as the engine for promoting culturally responsive teaching, thus contributing to equity (Berg & Parad, 2024). Leaders who adopt an equity mindset can create well-resourced systems that support individualized learning and deeper engagement for all students (Kim & Oh, 2023). Beliefs about collective responsibility significantly influence public support for equity-oriented educational policies (Lee & Lee, 2023). Collective leadership is essential for fostering equitable instruction, which is crucial for sustaining equity in education.

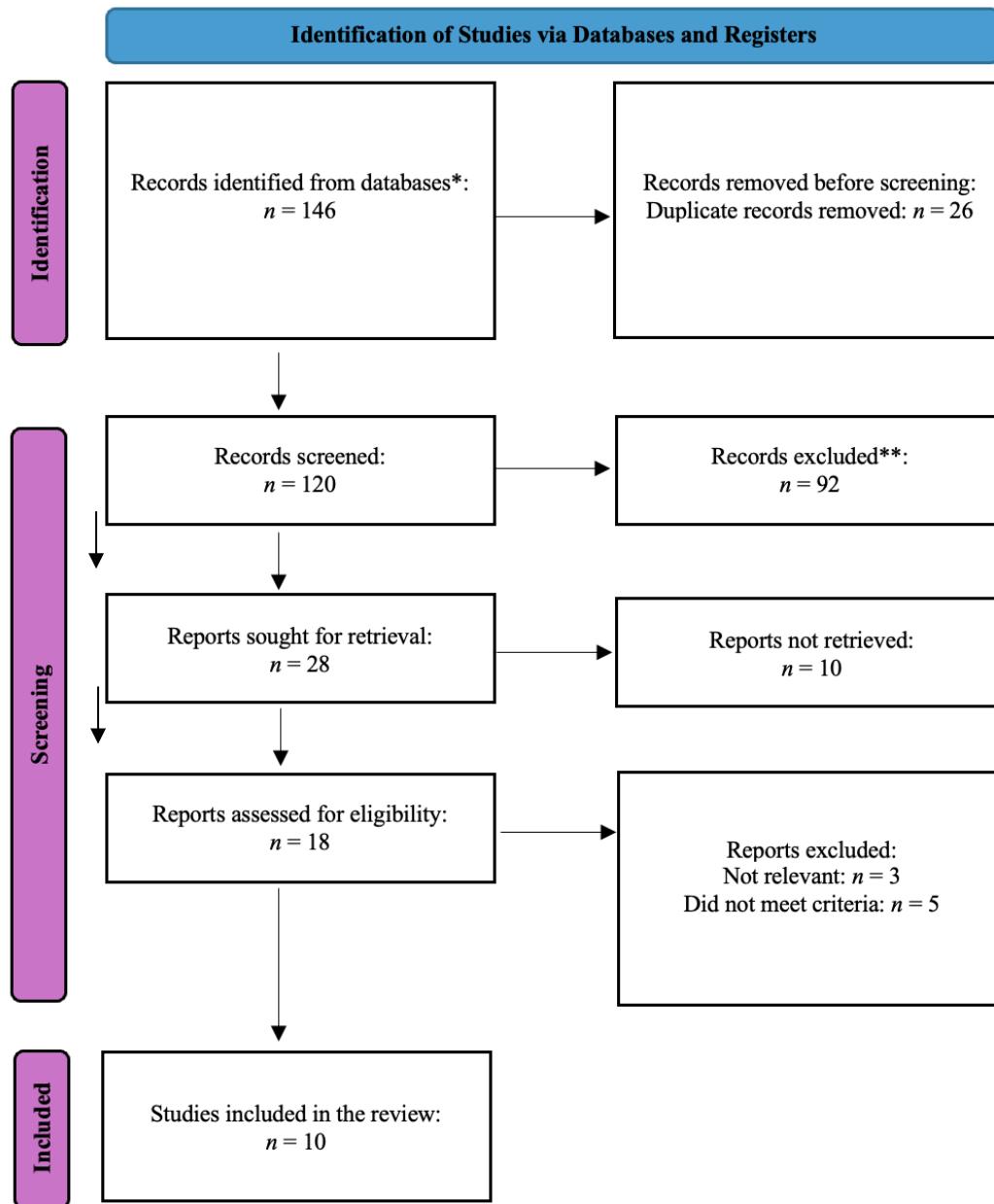
Collective leadership plays a crucial role in promoting equitable instruction through collaborative decision-making in curriculum and instruction. Instructional leadership has a direct positive effect on teachers' classroom practices and instructional quality (Bellibaş et al., 2022). Instructional leadership styles are associated with cultivating opportunities and a culture that encourages collaboration, which, in turn, influences the implementation of individualized education planning (Lambrecht et al., 2022). School leaders can contribute to more equitable conditions and outcomes for diverse students by encouraging culturally responsive instruction and building partnerships with parents and the community (Leithwood, 2021). Distributed leadership indirectly affects instructional quality through teacher collaboration and job satisfaction (Bellibaş et al., 2022). These findings emphasize the importance of collective leadership in fostering equitable instruction through collaborative decision-making processes in the educational context.

METHODOLOGY

This study employed a qualitative content synthesis of 10 peer-reviewed empirical studies published between 2019 and 2025. Articles were selected using the following criteria: (1) peer-reviewed publication after 2018, (2) US-based K–12 educational focus, (3) attention to leadership teams rather than individuals, and (4) analysis of instructional practices aimed at promoting equity.

Studies were identified using targeted search terms and Boolean operators: ("equity-centered" OR "equity-focused" OR "culturally responsive") AND ("instructional leadership" OR "collective leadership" OR "distributed leadership" OR "leadership team") AND ("K-12" OR "elementary school" OR "secondary school") AND ("instructional practices" OR "student outcomes"). The search was conducted using several academic databases that included ERIC (EBSCOhost), PsycINFO, Scopus, Web of Science, and ProQuest Dissertations & Theses Global. A literature review matrix was used to chart and analyze studies along five dimensions: author/year, purpose, data collection methods, key findings, and equity-related instructional strategies.

The analytic process drew on principles of inductive thematic coding, guided by frameworks described in *Schools That Learn* (Senge et al., 2012) and grounded in the belief that schools function as learning organizations. Themes were developed through constant comparison and recursive reading of article findings (Thomas & Harden, 2008). In line with Johnson et al.'s (2019) approach to instructional transformation, particular attention was given to how leadership teams designed interventions, responded to student performance data, and supported culturally affirming pedagogy. The resulting synthesis aims to identify common strategies across diverse contexts while highlighting implications for leadership practice and policy. Figure 1 outlines the article identification progress.

Figure 1**PRISMA Flow Diagram**

Note. *Records identified across individual databases were not documented; **Automation tools were not used.

The final sample for this review consisted of 10 peer-reviewed empirical studies published between 2019 and 2025 that examined how school leadership teams cultivate equity-centered instructional practices. These studies were identified through a comprehensive search process that initially yielded 132 articles from academic databases and an additional 14 from other sources. After removing duplicates and screening abstracts for relevance, 28 full-text articles were assessed. Of those, 18 were excluded due to not meeting criteria related to setting, population, or methodological focus. The 10 studies included in the synthesis represent diverse K–12 contexts and use a range of qualitative, mixed-methods, and conceptual approaches to explore how leadership teams influence culturally responsive pedagogy, professional learning, instructional collaboration, and equitable student outcomes. Table 1 below describes the articles included in this review.

Table 1*Articles Included in the Study*

Author	Date	Purpose	Data Collection	Study Findings
Bada et al.	2024	Examines leadership strategies to foster educational equity in higher education.	Theoretical analysis with policy review	Inclusive leadership and policy alignment with SDGs advanced equity for marginalized students.
Chikwe & Cooper	2019	Explores how school leaders use equity-related data to transform schools.	Phenomenological study	Data use as a diagnostic, roadmap, and conversational tool helped shift practices toward equity.
Eslinger	2023	Explores how leaders engage in culturally responsive practices to shift school culture and pedagogy.	Case study with interviews	Leadership involved a reorientation to justice, emphasizing community voice and inclusive instructional changes.
Gooden et al.	2023	Synthesizes literature to design equity-centered principal pipelines.	Conceptual analysis	CRSL framework highlights the need for systemic support and culturally responsive practices.
Kyere	2021	Investigates how Black school leaders interpret and navigate racialized educational spaces.	Narrative inquiry	Leaders drew from personal and professional experiences to resist deficit-based logics and create affirming spaces.
Leithwood	2021	Reviews 63 empirical studies on equitable school leadership practices.	Systematic review	Effective practices included building community partnerships and promoting culturally responsive instruction.
Marshall & Galey-Horn	2024	Examines how abolitionist frameworks reshape instructional leadership to address systemic injustice in schools.	Qualitative interviews and document analysis	Leaders resisted state accountability systems and re-centered collective wellbeing and justice.
Murwanto	2024	Reviews the importance of inclusive leadership in addressing diversity and discrimination in schools.	Literature review	Inclusive leadership supports equity by disrupting exclusionary practices and affirming student identities.
Peters et al.	2025	Explores the development of equity-focused leadership competencies in principal preparation programs.	Mixed-methods	Programs that integrated equity coursework and community-based experiences had stronger leadership outcomes.
Robinson	2024	Analyzes district-level equity initiatives and their effect on school practices and outcomes.	Policy analysis and interviews	Strategic equity leadership included aligning policies and resources with community needs.

RESULTS

The review of 10 peer-reviewed empirical studies revealed five cross-cutting themes that characterize how leadership teams cultivate equity-centered instructional practices in K–12 schools: (1) inclusive leadership as a foundation for equity, (2) equity-focused leadership pipelines, (3) equity-oriented data practices, (4) culturally responsive instruction, and (5) collaborative leadership and community engagement. These themes reflect shared strategies across diverse contexts and inform the collective work of school leaders seeking to dismantle systemic inequities in teaching and learning. Table 2 below describes which article contributed to each theme.

Table 2

Themes and Contributing Articles

Theme	Contributing Articles
Inclusive Leadership as a Foundation for Equity	Kyere, 2021; Leithwood, 2021; Murwanto, 2024;
Equity-Focused Leadership Pipelines	Gooden et al., 2023; Peters et al., 2025
Equity-Oriented Data Practices	Chikwe & Cooper, 2019; Kyere, 2021; Robinson, 2024
Culturally Responsive Instruction	Bada et al., 2024; Gooden et al., 2023; Leithwood, 2021
Collaborative Leadership and Community Engagement	Eslinger, 2023; Kyere, 2021

Inclusive Leadership as a Foundation for Equity

Three studies—Murwanto (2024), Leithwood (2021), and Kyere (2021)—provided strong evidence of inclusive leadership as a key mechanism for equity transformation. Murwanto (2024) emphasized that inclusive leadership disrupts traditional hierarchies and supports shared decision-making, helping dismantle systemic exclusion in schools. The study framed inclusive leadership as relational and values-driven, focusing on community engagement and dialogic problem-solving.

Leithwood (2021) illustrated that inclusive leadership improves outcomes by fostering trust-based relationships between school leaders, students, and families. In this study, leaders who cultivated respectful relationships were more effective at supporting culturally responsive practices and ensuring that instructional decisions reflected diverse student needs.

Kyere (2021) contributed a racial and cultural dimension to the discussion by focusing on Black principals. The study found that these leaders operated from a place of cultural affirmation and care, intentionally making students and families feel seen and valued. This form of inclusion extended beyond formal processes and reflected deeper social-emotional commitments to community.

Equity-Focused Leadership Pipelines

Gooden et al. (2023) and Peters et al. (2025) highlighted the role of structured leadership development in cultivating equity-minded school leaders. Gooden et al. (2023) documented how district leaders intentionally created and supported leadership pipelines designed to develop culturally responsive school leaders. These pipelines emphasized sustained professional development, reflection on bias, and alignment between leadership training and equity outcomes.

Peters et al. (2025) explored an equity-focused leadership preparation program that used coaching and inquiry cycles to shift participants' thinking and practice. The program helped aspiring leaders identify systemic inequities in their schools and take concrete steps to address them through instructional leadership. Together, these studies demonstrate the value of proactive, intentional leadership development strategies in building capacity for equity at scale.

Equity-Oriented Data Practices

Chikwe and Cooper (2019), Robinson (2024), and Kyere (2021) showed how leadership teams used data not just to monitor performance but to confront and correct inequities. Chikwe and Cooper (2019) highlighted how principals moved beyond basic data interpretation to engage in data-informed storytelling. By contextualizing numbers with student experiences, leaders fostered deeper conversations about equity and accountability within their schools. Robinson (2024) described using data strategically to address disproportionate enrollment in advanced courses and reduce biased referrals to interventions. In this study, school leaders actively examined patterns that limited student access and then implemented policy changes based on those findings. Kyere (2021) echoed these practices by showing how Black principals used data

not only to inform academic decisions but also to advocate for cultural and social inclusion. Data was framed as a tool for justice, not just management, reinforcing the importance of interpretation skills alongside technical use.

Culturally Responsive Instruction

Leithwood (2021), Bada et al. (2024), and Gooden et al. (2023) examined how leadership influences the promotion of culturally responsive instruction. Leithwood (2021) documented how leaders created conditions that encouraged instructional practices aligned with students' cultural identities and lived experiences. The study emphasized that these leaders prioritized student voice and culturally relevant curriculum in school improvement efforts. Bada et al. (2024) focused on the impact of professional development. The authors found that teachers were more likely to challenge deficit thinking and adopt inclusive pedagogies when leadership teams actively supported learning about cultural responsiveness. These efforts had measurable effects on student engagement and classroom climate. Gooden et al. (2023) provided a leadership development perspective, showing how new principals trained in culturally responsive leadership practices guided teachers toward more inclusive instructional strategies. These findings suggest that school leaders serve as critical catalysts for building and sustaining culturally affirming environments.

Collaborative Leadership and Community Engagement

Eslinger (2023) and Kyere (2021) explored the ways leadership teams engage families and communities as co-creators in school change. Eslinger (2023) described how school leaders shifted governance models to elevate community voice, particularly in curriculum design and disciplinary policy. These actions increased school responsiveness and student belonging. Kyere (2021) again emphasized the importance of culturally grounded leadership, noting that trust-building with families was central to success. Leaders in the study took intentional steps to honor cultural identity and shared power with community members in shaping school practices.

DISCUSSION

This study synthesized findings from 10 peer-reviewed empirical articles to explore how leadership teams cultivate equity-centered instructional practices in K–12 schools. The thematic analysis revealed five interrelated strategies: inclusive leadership, equity-focused leadership pipelines, equity-oriented data practices, culturally responsive instruction, and collaborative leadership with community engagement. These themes reinforce the body of scholarship calling for systemic, leader-driven efforts to dismantle persistent educational inequities.

The results align closely with existing literature on effective school leadership. DuFour and Marzano (2011) emphasized that meaningful instructional leadership must be anchored in collaboration, trust, and a shared vision for student success. The findings from this review affirm that inclusive leadership practices—grounded in relational trust and shared responsibility—are foundational to advancing equity goals. Murwanto (2024), Leithwood (2021), and Kyere (2021) show that inclusive leadership practices break down traditional power hierarchies and promote shared decision-making. These practices align with the principles of distributed and transformational leadership, as the literature review indicates.

Developing equity-minded leaders through intentional pipelines also reflects the urgent need for targeted leadership preparation programs. As Hattie (2023), Goddard et al. (2000), Gooden et al. (2023), and Peters et al. (2025) have argued, leadership efficacy significantly affects student outcomes, especially when leaders can foster collective efficacy among teachers. The studies reviewed here suggest that when equity is embedded into leadership development—through reflective inquiry, mentoring, and culturally responsive training—leaders are more likely to recognize and act on systemic disparities (Johnson et al., 2017). These findings correspond with systems theory, which conceptualizes schools as interrelated systems that influence the broader organization (Sachar, 2025).

Data use also emerged as an important lever for advancing equity. Unlike traditional data practices that focus narrowly on achievement gaps, the reviewed studies illustrate how equity-focused leaders use data for inquiry and transformation (Chikwe & Cooper, 2019; Robinson, 2024; Kyere, 2021). This mirrors Kim and Oh's (2023) work, which found that equity audits and data-informed leadership can drive advocacy, reflection, and school reform.

In terms of pedagogy, the findings support Oakes' (2005) assertion that schooling structures often track students inequitably unless disrupted by intentional, culturally responsive instructional practices. Leadership teams that center identity-affirming curriculum and engage in ongoing professional learning can shift teaching practices away from deficit models and toward equity-oriented, inclusive instruction (Johnson et al., 2019; Theokas et al., 2019). This aligns with the UDL framework, which focuses on accessible, flexible instruction (Alarcón & Pineda, 2024; Cressey, 2020). The emphasis on CRP as a leadership strategy also reaffirms previous scholarship on CRP's role in equitable teaching (Bada et al., 2024;

Stembridge, 2019). The reviewed studies emphasized that such pedagogical shifts require not only teacher-level action, but school-wide leadership support and alignment.

Finally, the significance of authentic community engagement cannot be overstated. Consistent with Eslinger (2023) and Kyere (2021), who argue that learning organizations must be deeply participatory, this review found that schools advancing equity were those where leaders fostered reciprocal relationships with families and community members. Collaborative leadership and community engagement form part of the tenets of social constructionism, which views leadership and knowledge as shaped through interactions and shared experiences (Sachar, 2025). Community voice was not treated as an external input but as a core influence on school policy and instructional practice.

IMPLICATIONS

The findings of this systematic review suggest that equity is not an incidental outcome of leadership, but an intentional, sustained commitment embedded in organizational culture and daily practices. Hence, leadership teams must move beyond technical compliance models and toward systemic, value-driven leadership. Building inclusive school cultures that foster authentic partnerships with families and communities, embedding equity in leadership development through investment in equity-centered leadership development programs, and using data narratively can help drive instructional change through integrating equity-focused data practices into school improvement plans. Moreover, professional development must be ongoing and grounded in cultural responsiveness, not just one-time training sessions (Johnson et al., 2019).

Policy efforts should focus on funding and scaling leadership development programs that prioritize equity through shared governance and distributed responsibilities (Gooden et al., 2023). State and district policy should support data systems that allow for nuanced interpretation, and incentives should be provided for schools that build genuine community partnerships. Additionally, accountability frameworks must reflect relational and cultural outcomes—not only test scores (Hattie, 2023; Marzano, 2003).

Future research should explore how these five themes manifest across different school contexts (e.g., rural, suburban, and urban) and within various student populations. Longitudinal studies would help determine the sustained impact of equity-centered leadership interventions. More research is also needed on the intersection of race, leadership identity, and instructional decision-making, particularly in historically marginalized communities (Johnson et al., 2023).

CONCLUSION

Based on the study results and discussion, equity in K–12 instruction advances most effectively when leadership is inclusive, collaborative, culturally grounded, and justice-oriented. To dismantle systemic barriers and create an educational environment where students from different cultural backgrounds can learn, schools should adopt a collective leadership framework. This will allow schools to navigate complex equity challenges. Strategies identified in this study's implications provide a roadmap for sustainable, transformative change in education.

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