Experiencing Leadership:
A Study Exploring Perceptions of Leadership
of People Who Pursued Doctoral Studies in
Educational Leadership at Simon Fraser University

by

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Abstract

Although leadership research has amplified over the past decades, leadership is still puzzling. Scholars and practitioners have jointly contributed to the understanding of the leadership phenomenon, the advancement of comprehensive definitions, and the development of theory and praxis of leadership. This qualitative interpretive study aimed to discover what aspects of leadership theory were found in the practice of educational leaders and implications for the design and the development of leadership education. In order to achieve these goals, I explored, analyzed, and interpreted how people who pursued doctoral studies in Educational Leadership at Simon Fraser University experience leadership. For this study, I constructed a conceptual framework consisting of three Leadership Domains (Individual, Interactional, and Collective) and two embedded Leadership Dimensions (Development and Implementation). I used in-depth interviewing methods to collect participants' leadership stories about their perspectives, development, and implementation of leadership. Data were analyzed to identify themes and triangulated within and across interviews and with researcher's systematic reflections. This study's key findings showed that leadership was a multifaceted phenomenon, shaped by people's past experiences, and perceived as responsibility rather than authority. Participants perceived leadership as concerning people, relationships, influence, and change. Leadership development was seen as a lengthy and intricate journey, involving engagement in various forms of education, with formal education having the most impact. In addition, leadership emerged formally and informally in organizations and its implementation was primarily contextual. This study contributes to literature by providing a better understanding of educational leadership. It demonstrates that a systematic approach to studying leadership generates a richer and more cohesive perspective of this complex phenomenon. In this sense, the conceptual framework constructed for the study and the methodological approach can be used for future leadership research. The study is also useful to leadership scholars and practitioners, as well as to organisations providing leadership education.

Keywords: leadership; educational leadership; leadership development; leadership implementation; individual leadership; interactional leadership; collective leadership; qualitative interpretive study; leadership education

To my loved ones:

You kept hope alive by never doubting that I would finish this journey strong.

This is for you.

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Chapter 1.   Introduction

1.1. Background of the Study

Despite being studied extensively, leadership is still "a contested concept" (Middlehurst, 2008, p. 327), a puzzling phenomenon to many, and far from being fully understood (Avolio, Walumbwa, & Weber, 2009; Gronn, 2016; Northouse, 2016; Simkins, 2005). Scholars and practitioners have jointly contributed to the understanding of the leadership phenomenon, the advancement of comprehensive definitions, and the development of theory and praxis of leadership. Nevertheless, defining leadership is as complex as defining "*democracy, love,* and *peace*" (Northouse, 2016, p. 2, original emphasis). Historically, new ways of leading have emerged in our society and the conceptualization of leadership has undergone numerous shifts. As well, general or more discipline-specific leadership theories, approaches, and models have been developed. These have evolved from the "great man" theories to models of leadership that emphasize the process of influence taking place in leader-follower relationships (Lynch, 2012; Northouse, 2016). More recently, leadership has been conceptualized in a collective manner, as taking shape in multidirectional relationships, or has been studied more holistically, as a mix of the individual, collective, organizational, and situational aspects of leadership (Bolden, 2011; Gronn, 2016; Northouse, 2016).

Much has been written about leadership and the theory and research approaches vary widely. When discussing why studying leadership proved to be challenging, Middlehurst (2008) argued that in fact, the variety in assumptions, focus, causal links, lenses, values, and terminology impeded clarity and consistency in conceptualizing the leadership phenomenon. Looking at the leadership field overall, it seems that Stogdill's (1974, p. 4, as cited in Northouse, 2016) claim that "there are almost as many different definitions of *leadership* as there are people who have tried to define it" (p. 2, original emphasis) still stands. When I began reading about leadership several years back, the discourse was that of a lack of leadership research. Educational leadership is no exception. The field of leadership research has expanded considerably since, and a greater attention has been given to leadership development. Despite this "explosion" of leadership literature, not much has been added to "the mainstream of key ideas about leadership" (Simkins, 2005, p. 9) and particularly, "for the field [of

educational leadership and management] as a whole, greater diversity has not added up to greater accumulation of knowledge" (Heck & Hallinger, 2005, p. 232). Hence, there seems to be a need for more comprehensive and cohesive frameworks of leadership to be created. One way to accomplish this task is to establish connections between existing leadership theories, approaches, and models and generate a richer picture of what educational leadership is and how it can be better understood, developed, and practiced (Dinh et al., 2014; Lamm et al., 2016; Simkins, 2005). My research study falls within this realm.

Considering the many initiatives that focus on leadership development, one may wonder if people who pursue these opportunities and/or are exposed to the richness of leadership theory and research are, in fact, equipped to face the complexities and challenges that educational leadership presents. As someone who pursued graduate studies in leadership and chose to engage in studying and practicing leadership, I wondered about this, too. This research study was inspired by questions I had about how the leadership phenomenon was defined, theorized, and practiced and how these aspects could or would integrate.

1.2. Purpose of the Study

The overarching purposes of this study was to identify aspects of leadership theory that were found in the practice of leaders and implications for the design and development of leadership studies programs. In order to achieve these goals, I explored, analyzed, and interpreted how people who pursued doctoral studies in Educational Leadership (EdDL) at Simon Fraser University (SFU) experienced leadership. In doing so, I hoped to gain some understanding of how participants defined and experienced leadership, as well as find some approaches that supported leadership development and/or helped alleviate challenges that appeared in leadership implementation. Then, drawing from participants' experiences with leadership, I hoped to determine what aspects of established leadership theories were more prevalent in leadership implementation, as well as make recommendations for the design and development of programs aiming to prepare future educational leaders.

1.3. Research Design Overview

This study was framed as a qualitative study, a methodology used to better understand a complex phenomenon. In the beginning of this research, I read widely about leadership and selected a body of literature to review. In this process, I constructed a conceptual framework for the study, consisting of three Leadership Domains—*Individual, Interactional,* and *Collective*, and two embedded Leadership Dimensions—*Development* and *Implementation*. These components of the conceptual framework were then used to inform the data collection, analysis, and interpretation. To collect data for the study, I recruited 22 alumni from the Educational Doctorate in Leadership at Simon Fraser University, and I used an interview guide developed during a multiphase pilot testing. The in-depth participant interviews focused on three primary areas of their leadership experiences: overall perspective of leadership, leadership development, and leadership implementation. I conducted the 22 interviews in person or remotely, and I audio recorded and transcribed them verbatim. In presenting the findings, participants were identified using pseudonyms. The dataset collected for this study consisted of interview transcripts and my systematic reflections—post-interview notes and reflections on the data collection and analysis processes. I began the data analysis with a preliminary analysis, which provided me with an overview of the entire dataset and the 22 individual interviews. In this analysis, I also extracted the highlights of the interviews. I then analyzed each interview individually, a process meant to identify themes within the interview. Next, I engaged in a deeper cross-interview analysis to identify patterns and themes that emerged within the primary areas of participants' leadership experiences. Finally, I integrated the findings for an overall picture of how leadership was defined and described by the participants. To ensure trustworthiness of this study, I kept a reflective journal for the duration of the study and asked participants to review their transcripts, my initial interpretation of their interview in the form of interview highlights, and a preliminary draft of the findings.

1.4. Significance

This study was intended to provide a way to bridge the gap between theory, research, and practice by attempting to map what happened in practice to aspects of established leadership theories and vice-versa. Participants in this study engaged in

learning about leadership in a doctoral program. The assumption made was that by being exposed to the literature and scholarship of leadership, participants developed an understanding of the phenomenon that may have informed their leadership practice. With the purpose of conducting this study being to identify aspects of theory that emerged in practice, I considered that participants' exposure to the leadership theory and research during the doctoral program, along with their leadership experiences from practice, would allow me to collect quality data. These data would subsequently be used to distinguish the multiple facets of leadership and find out and how these facets could or would integrate. Moreover, I considered that participants' experiences with leadership would provide useful insights for the design and development of programs aiming to prepare future educational leaders.

Even though this qualitative study was not intended to be used to make generalizations about leadership, it contributes to the field by allowing for a better understanding of the leadership phenomenon, as it materializes primarily in education, and providing insights about leadership development based on participants' experiences with leadership. The conceptual framework constructed for the study provides an integrative perspective of how leadership is theorized and practiced. By constructing this framework, I intended to respond to Bryman's (2004) call to build more on previous qualitative empirical research. The conceptual framework and methodological approach used in this study could be used for further investigation of the leadership phenomenon. Some areas of future research identified by Kezar, Carducci, and Contreras-McGavin (2006) that this study added to were: the relationship between learning and leadership, the multifaceted nature of leadership, the significance of context in leadership implementation, collaboration and engagement of different perspectives as strategies to address the complexities of situations encountered in practice, and the importance of ethics in the processes of influence that occur in leadership. The study is useful to researchers and practitioners in the field, as well as institutions designing programs with focus on leadership development. This study is also meaningful to me, a researcher, as it has provided an opportunity to engage in qualitative research processes and explore paradigms that were new and outside of my conform zone.

1.5. Dissertation Overview

This dissertation consists of six chapters. This chapter presented the background and purpose of the study, followed by an overview of the research design and significance of the study. Chapter Two presents a review of literature, including the steps taken to construct the conceptual framework used in this study, and a detailed description of each of the primary framework components. Chapter Three provides a description of the methodology, including how I situate myself as the researcher, the research questions, and the methods used in data collection and analysis. Chapter Four focuses on the study findings, followed by the discussion in Chapter Five. The final chapter of this dissertation provides the implications for theory and practice, as well as contributions to the field, recommended areas for future research, recommendations for policy and practice, and several lessons that I learned by engaging in this research study.

Chapter 2.   Literature Review

2.1. Introduction

This chapter provides a review of a select body of literature that offers an overview of how the educational leadership phenomenon is defined and understood in theory and research. In the next section, I describe the process of searching and selecting the literature relevant to this study. This process is expanded further in the chapter, where I describe the steps taken to conduct this literature review and construct the conceptual framework. Next, I focus on ways in which leadership was defined in literature, differentiating between the concepts directly associated with leadership, with a focus on management, and showcasing how the conceptualization of the phenomenon evolved over time. Then, I change focus to present an overview of the status of educational leadership research, to situate my research and provide a brief rationale for undertaking this study. Following that, I describe the conceptual framework constructed for this study. I begin by describing the development process, including the seven steps taken to construct the conceptual framework. The framework consists of three Leadership Domains—*Individual, Interactional,* and *Collective*, with two Leadership Dimensions embedded within each domain—*Development* and *Implementation*. This conceptual framework is important because it was used in developing the data collection instrument and it guided the analysis, interpretation, and reporting processes. The chapter concludes with a narrative of educational leadership based on an integration of the key aspects of leadership found in the literature reviewed for this study.

2.2. An Overview of Leadership Literature

In commencing this study, I conducted a search of literature and read widely about leadership to understand the current state of the field. I began by reading about leadership, in general sense, and then, I focused on conceptual research and academic books. I found that these resources provided comprehensive perspectives of the phenomenon and/or syntheses of previous literature. To better understand educational leadership, I continued by reading more specifically about higher education leadership and then, about school leadership. This was an emergent process that helped me familiarize with the existing literature, identify relevant resources to review further, as

well as find ways to integrate these resources and construct the conceptual framework for this study. In order to provide an overview of the leadership literature, this section begins with a description of the search and selection processes, including the literature selection criteria, the ways in which leadership has been defined in literature, and how leadership relates to management. Then, the section presents an overview of the current state of educational leadership literature and how this literature review informed my undertaking the current research study.

2.2.1. Literature Search and Selection

In the initial phase of this literature search and selection, I read widely about leadership. I noticed that over the past couple of decades, there was an increasing interest in the leadership topic. In an attempt to narrow the scope of the literature review, I continued with more refined database searches, targeting theories and scholars that seemed to be more prevalent in educational leadership (higher education and K-12). I expected to find that there was a lack of educational leadership research, yet I found instead a vast body of conceptual and empirical leadership literature. For example, one of the database searches on higher education leadership returned over 25,000 articles. Another search on school leadership returned over 29,000 articles. To form an understanding on how leadership was conceptualized, I identified and read in more detail about several established leadership theories and approaches and then focused on empirical research related to leadership in educational settings. Each body of literature brought to light new aspects of leadership and my understanding about the field developed gradually in this initial review, also taking some unexpected turns. While some concepts became clearer in this literature scan and sort process, often more thought-provoking questions surfaced.

A more detailed description of the process that I used to search for the literature, as well as how the selection criteria emerged and were refined in this process may be found later in this chapter. These criteria helped me appraise what resources were relevant to the scope and the timeframe of this study. The resources I selected were published in English between 2000 and 2017, namely conceptual resources on general and educational leadership and empirical research on educational leadership in Canada or similar contexts. The rationale behind these selection criteria are presented next. Firstly, being originally written and published in English, these resources were

accessible to me (the researcher) and there was minimal risk that nuances and/or concepts were lost in the translation process (Bryman, 2007). Secondly, some of the selected resources presented a historical account of leadership, which was useful to understand how leadership has evolved (Northouse, 2016). As theory systematically builds on prior concepts, the conceptual literature from the selected timeframe provided an overview of more recent leadership theories as well as concepts that were incorporated in earlier leadership theories. Hence, although not exhaustive, the selected conceptual resources (e.g., peer reviewed conceptual journal articles and academic books) offered a basis for understanding of how leadership has been defined and theorized, in general sense, or as it pertains to education.

Thirdly, I elected to focus some of my readings on qualitative empirical research on educational leadership. However, the emphasis on empirical qualitative research did not mean that I deemed other types of research not relevant to the understanding of the phenomenon. In fact, academic books and some conceptual articles that I used in this literature review synthesized research conducted using various methods of inquiry. For example, Northouse's (2016) book contained case studies and leadership questionnaires developed to illustrate and respectively, measure different leadership theories and approaches. Also, Briggs et al. (2012) presented various research approaches and methods for data collection and analysis, including surveys, questionnaires, and statistical analyses. Thus, even though quantitative or mixed empirical research was not explicitly used in this literature review, it played an important role in conceptual literature. In the process of reviewing the body of empirical research, I found that I gained more value from qualitative research. Studies that would "probe what people mean by leadership, that query how we know when leadership has taken place, that show that people are frequently confused about the nature of leadership, that suggest that leadership is often constituted through language" (Bryman, 2004, p. 760) provided a profound and rich description of the phenomenon. These qualitative studies helped me engage with the concepts under study on a deeper level and better understand how leadership unfolded in educational contexts. Finally, in some of the phases of this literature review, I read about leadership in different educational settings and contexts around the world. Later, I focused the review on literature that offered useful insights on the topic of leadership, approaches to leadership research, and aspects of leadership development and implementation in Canadian or similar

educational contexts (e.g., United States, New Zealand, Australia, and United Kingdom) (Briggs et al., 2012; Bush, 2011; Gibbs, Knapper, & Piccinin, 2008; Northouse, 2016). The remainder of this section presents some definitions of leadership found in literature, how leadership evolved, and how it relates to management.

Leadership Defined

In surveying the literature, I found that numerous scholars endeavored to provide comprehensive analyses of various aspects of leadership theory, in general sense or specific to education. For example, on a more general view of leadership, Northouse (2016) reviewed fifteen established leadership theories and approaches, providing supportive case studies and measurement instruments for each. The review focused on trait, skills, behavioural, and situational approaches; path-goal and leader-member exchange theories; transformational, authentic, servant, adaptive, psychodynamic, and team leadership; as well as issues of ethics, gender, and culture as they related to leadership. In addition, Dinh et al. (2014) conducted a critical review of leadership literature as found in ten top-tier academic journals over a twelve-year period, identifying 23 thematic categories and 66 different domains of leadership theory. Some examples of thematic categories identified in this review were: neo-charismatic, information processing, social exchange/relational, follower-centric, strategic, contextual, complexity and systems, destructive, leading for creativity and change, and e-leadership. Moreover, Avolio et al. (2009) reviewed twelve newer theoretical and empirical approaches to leadership, describing main concepts and how they differentiated from earlier models and identifying developments and areas of further research. They examined authentic, cognitive, new-genre, complexity, shared, servant, cross-cultural, and e-leadership, as well as leader-member exchange, followership, spirituality, and substitutes for leadership. In this review, Avolio et al. (2009) distinguished between "traditional leadership models, which described leader behavior, in terms of leader-follower exchange relationships, setting goals, providing direction and support, and reinforcement behaviors" (p. 428) and "new-genre leadership models [that] emphasized symbolic leader behavior; visionary, inspirational messages; emotional feelings; ideological and moral values; individualized attention; and intellectual stimulation" (p. 428). Bryman (2004), Bryman and Lilley (2009), and Kezar et al. (2006) also distinguished between different paradigms of leadership and acknowledged that the latter group of concepts outlined by Avolio et al. (2009) were central in newer leadership theories.

In terms of educational leadership, there was an extensive body of theoretical and empirical literature. The approaches were diverse and reflected the advancement of the more general leadership theory and research (Bryman, 2004; Dinh et al., 2014; Northouse, 2016). For instance, Lynch (2012) presented ten effective leadership styles to leading schools, along with corresponding case studies and vignettes: transformational, instructional, distributed, ethical, emotional, entrepreneurial, strategic, sustainable, invitational, and constructivist leadership. Additionally, Bush (2011) distinguished between educational leadership and management, clarifying why theory was relevant to "good practice" and classifying ten models of educational leadership— managerial, participative, transformational, distributed, transactional, postmodern, emotional, contingency, moral, and instructional—and six models of educational management—formal, collegial, political, subjective, ambiguity, and cultural. Finally, Briggs et al. (2012) focused their work on a wide range of issues including philosophical underpinnings, methodologies, and practices of research in educational leadership.

Researchers argued that models of leadership emphasizing individual exceptionalism in mastering skills, behaviours, and styles have become unsuitable for leading today's complex educational organizations (Gronn, 2003, 2016; Simkins, 2005). Hence, there was a need for new approaches to leadership that concentrated on relational processes, dialogue, collaborative practices, or informal leadership (Bolden, Petrov, & Gosling, 2008; Bolden & Petrov, 2014; Briggs et al., 2012; Lamm et al., 2016; Lynch, 2012; Temple & Ylitalo, 2009). As well, Leithwood (2008) argued that educational leadership needed to focus on both "best" (what worked) and "next" (innovation) practices and that both systematic empirical research and engagement in creative and innovative leadership were required in leading school effectively. Kezar et al. (2006) outlined the need to rethink and reconceptualize higher education leadership, highlighting notions such as context, collaboration, social change, empowerment, spirituality, and accountability. Along with these newer approaches, comprehensive frameworks of leadership development have been designed to help better prepare the "leader of tomorrow" (Catalfamo, 2010; Dinh et al., 2014; Lamm et al., 2016; Middlehurst, 2008; Wang & Sedivy-Benton, 2016).

From Leader to Leadership

The phenomenon of leadership has been conceptualized using various perspectives. Scholars and practitioners have attempted consistently to encompass the multiple facets of leadership in overarching definitions. Many times, though, the approach to leadership seems to be oversimplified or dictated by the discipline, which made reaching consensus for a common leadership definition even more challenging (Gibbs et al., 2008; Kezar et al., 2006; Middlehurst, 2008; Northouse, 2016). Research on educational leadership has also been criticized as being "discipline blind" and focusing primarily on school principal or senior administrative roles in institutions (Amey, 2005; Gibbs et al., 2008; Lynch, 2012). The uniqueness and complexity of academia added to the ambiguity of conceptualizing leadership that took place here and thus, there were few theories tailored to educational leadership (Cardno, 2013; Sathye, 2004; Wang & Sedivy-Benton, 2016). A question is raised, though: Can leadership theory be fully tailored to a field or organization?

In surveying the leadership literature on a wider spectrum, conceptualizing the phenomenon has shifted over time from residing in an individual (i.e., leader), to a process, and to a practice. For instance, Northouse (2016) presented different leadership definitions and how they have evolved. In earlier definitions, leadership emphasized an individual's "control and centralization of power with a common theme of domination" (Northouse, 2016, p. 2) and an individual's traits, behaviours, and their ability to "influence overall group effectiveness" (Northouse, 2016, p. 3). But leadership referred to "*noncoercive* influence" (Northouse, 2016, p. 4, original emphasis) that people had on one another within a certain context. Later, leadership was defined as a process of collaboration and transformation within a social or organizational context with the purpose of attaining common goals. Leadership has also been conceived as a practice shared by people throughout an organization, or as "hybrid patterns or configurations" (Gronn, 2009, p. 390) that emerged in practice and were bound by time, space, and context (Bolden et al., 2008; Gronn, 2009, 2016). Contemporary leaders were encouraged to consider the contexts of their leadership practice and development (e.g., tasks, people, circumstances, and institutional history) in the process of recruitment, promotion, retention, or in the career planning and development of their followers.

Research in educational leadership showed that people were encouraged to participate rather than observe leadership, learn and engage collectively in leadership processes, and create change regardless of their formal roles within the organization (Amey, 2006; Simkins, 2005; Jones, Lefoe, Harvey, & Ryland, 2012; Kezar et al., 2006; Senge et al., 2012; Woodard, Love, & Komives, 2000). Educational leadership was often defined not only as residing in a person or as a process of influence—which were important facets of leadership—but as a collective or distributive practice, community of practice, or a combination of individual, collective, organizational, and situational elements (Bolden & Petrov, 2014; Bouchamma & Brie, 2014; Catalfamo, 2010; Davison et al., 2013; Dinh et al., 2014; Gibbs et al., 2008; Youngs, 2017).

Despite the growth and diversity of how leadership has been studied, "leadership will continue to have different meanings for different people" (Northouse, 2016, p. 5). The understanding of the complexities and scope of the phenomenon is still considered limited. To enrich the understanding of current approaches to leadership, it is vital to identify how and if concepts of earlier leadership translate to the newer leadership landscape (Middlehurst, 2008; Simkins, 2005). It seems that for the field to reach the next level, now may be the time to rethink some of the predominant assumptions that still persist in defining leadership (e.g., leaders are born, the focus on the positional power, the causal link between leaders and events); revisit the lens and methodological approaches used in studying the phenomenon; open new avenues for interdisciplinary and cross-field dialogue; and reconceptualize leadership in a distributed rather than a focused form, a function or a quality rather than a formal position (Davison et al., 2013; Gronn, 2003; Heck & Hallinger, 2008; Middlehurst, 2008; Wang & Sedivy-Benton, 2016; Yielder & Codling, 2004). Fenwick (2010) argued that careful consideration also needed to be given to interdisciplinary approaches to leadership, keeping in mind that when interdisciplinarity was reduced to only "borrowing" a lens to study a phenomenon (i.e., leadership) but ontological foundations differ, concepts might not translate entirely and instead of bringing clarity, it might add to the misperception of the phenomenon (see also McClellan, 2010).

Leadership or Management: What's in a Name?

Studying leadership on its own is challenging. For a long time, for example, research and practice arenas have been the place for debate on what constitutes

leadership and management. In education, particularly, the term administration, which is used in North America and Australia to indicate senior administration roles, adds an extra layer of complexity in understanding leadership (Bush, 2011). Some perceived administrative roles as encompassing managerial tasks and leadership enactments (Allison & Ramirez, 2016; Yielder & Codling, 2004). Others considered management, administration, and leadership as labels that described the same concept and/or were used at different times in the history of leadership conceptualization (see Bush, 2011; Northouse, 2016). Moreover, leadership was perceived as overlapping with concepts such as power and authority (Northouse, 2016; Yielder & Codling, 2004). In literature, terminology was used interchangeably and depending on the geographical area, similarly perceived concepts were named differently (Bush, 2011; Uusiautti, 2013). As a newer term with a rising popularity, leadership seemed to be replacing what was previously called management (Gronn, 2003). Also, often, similar concepts encompassed in earlier definitions were not accounted for in new ones. As well, newer definitions may encompass new representations of phenomena. Therefore, in general, terminology added ambiguity to how the leadership phenomenon was understood. In this study, I consider leadership as being about the people-side of an organization. I also consider leadership as being different than management, with the latter primarily focusing on the maintenance or technical side of organizations. To provide some clarity, I briefly present next how the concepts of leadership and management differ in literature.

Many researchers agreed that while both leadership and management were important in organizations and often overlap in many ways, there were several features that made leadership unique (Fenwick, 2010; Northouse, 2016; Simkins, 2005). For example, leadership was perceived as producing change and movement while management as producing order and consistency (Northouse, 2016). Some associated leadership with values, vision, mission, innovation, and culture and saw management as either a key element of leadership or a different concept that focused on tasks, technical and operational issues, and systems and results (Bernardo, Butcher, & Howard, 2014; Bush, 2011; Cardno, 2013; Davison et al., 2013; Yielder & Codling, 2004). Moreover, management seemed to be associated with a role someone held in an organization whereas leadership occurred regardless of formal roles (Yielder & Codling, 2004). As well, management tended to be more concerned with following a set of rules and procedures to accomplish tasks whereas leadership was perceived as human,

concerned with developing new processes when the old ones failed, and inspiring people to persevere despite difficulties (Basham & Mathur, 2010; Fenwick, 2010; Simkins, 2005). Some praised leadership as being an "art, involving creativity, flow and dialogue" (Fenwick, 2010, p. 90). But there were also researchers who took a more critical approach to leadership and questioned the use of the term itself (e.g., Gronn, 2003).

In some of the recent theories of leadership—which focused on the practice of leadership rather than the leader as an individual or the process of influence—the concepts of leadership and management seemed to overlap more, and the boundaries became blurrier. When used interchangeably, confusion might be generated. Although the names had similar origins and in general, were considered as being concerned with some aspects of people or organizational development, the two concepts were distinct in terms of focus, required skills, knowledge, abilities, and outcomes (Bryman & Lilley, 2009; Bush, 2011; Cardno, 2013; Yielder & Codling, 2004). Managerial leadership was only a form of leadership and leadership *per se* was not defined as someone holding a managerial position (Uhl-Bien, 2006; Yielder & Codling, 2004). In academic institutions, the co-existence—yet not overlapping—of academic and managerial leadership created tensions. When overlooked, these tensions might result in poor leadership practices; hence, the call for placing equal value on both and implementing more collaborative processes (Yielder & Codling, 2004).

2.2.2. The Current State of Educational Leadership Literature

The complexities of education need to be reflected in educational leadership theory, too. Many scholars argued that educational leadership was highly contextual and some claimed that introducing leadership theories from other disciplines or that were developed based on contexts other than education did not address the unique features of educational leadership (Bryman & Lilley, 2009; Bush, 2011; Gibbs et al., 2008; Sathye, 2004; Simkins, 2005; Uusiautti, 2013; Wang & Sedivy-Benton, 2016). For example, academic leadership needed to encompass the pillars of education—teaching, research, scholarship, and service, thus, borrowed leadership theories were not entirely applicable. Leaders in education needed to be skilled and engaged in all these main areas in order to overcome challenges arising from dealing with multiple stakeholders and possible conflicting expectations (Bolden et al., 2008; Cardno, 2013; Gibbs et al.,

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2008; Middlehurst, 2008; Yielder & Codling, 2004). Specific skills were not easily transferable from one area to the other; thus, holding a formal leadership role required broad knowledge of the organization and its governing policies, as well as deeper understanding of the complexities and challenges that the actual role entailed. Some leadership approaches seemed to be more successful than others; however, they could not be adopted in a deterministic manner. Research showed that factors such as institutional culture and structure also played a role in the success of presidential initiatives (Barrett, 2006) and top-management teams (Woodfield & Kennie, 2008). Thus, leadership implementation needs to be adapted to the institutional context.

The study of educational leadership seemed to have emerged as a field on its own, focusing on issues specific to educational contexts (Bush, 2011). However, gaps between theory and practice of educational leadership still existed and there were no leadership theories tailored for education (Heck & Hallinger, 2005; Lamm et al., 2014; Middlehurst, 2008; Wang & Sedivy-Benton, 2016). Despite a long-standing endeavour to construct a "grand theory of leadership", the field of educational leadership might be too diverse to facilitate this process and in fact, the diversity might even prevent this from happening (Bush, 2011; Heck & Hallinger, 2005). There was also an increasing interest in investigating styles, behaviours, and actions that made educational leaders effective (Bryman, 2007; Bryman & Lilley, 2009; Cardno, 2013; Souba & Day, 2006; Woodfield & Kennie, 2008). But focusing only on successful leaders did not provide a complete picture of leadership (Bryman & Lilley, 2009; Wang & Sedivy-Benton, 2016). Some argued that there was a need for a richer understanding of how and why leaders acted the way they did and deemed practical experience as one of the best learning mechanisms (Temple & Ylitalo, 2009; Uusiautti, 2013). Nevertheless, leaders could not rely solely on experience to guide their actions. Several authors argued that theory and research facilitated an enhanced understanding of how the phenomenon manifests, guided leaders in their actions and decision-making processes, and promoted practices that did not allow for oversimplification of complex issues and implementation of quick fixes (Bush, 2011; Heck & Hallinger, 2005; Middlehurst, 2008; Wang & Sedivy-Benton, 2016).

There are numerous ways to perceive the broad nature of leadership in education. Generally, researchers differentiated between leadership of the institution, exercised by senior administrators, and leadership in the institution, exercised informally

or formally, at different levels within the institution, such as team or department level (Bryman, 2007; Cardno, 2013). As much of educational leadership research focused on college and university presidents or school principals, somehow, it conveyed the message that leadership was contained in the formal role one held in an institution (Amey, 2006; Barrett, 2006; Bryman, 2007; Lynch, 2012; Torres & Evans, 2005). Nevertheless, there were other areas of interest that supplemented the view of educational leadership: middle and senior academic leaders (Cardno, 2013; Gentle & Clifton, 2017; Vilkinas & Cartan, 2015; Uusiautti, 2013), department heads (Bryman & Lilley, 2009; Riley & Russell, 2013; Stanley & Algert, 2007), teacher leadership (Lynch, 2012), student affairs (Harrison, 2011; McClellan, 2010; Woodard et al., 2000), and student leadership development (Amey, 2005; Catalfamo, 2010).

When reading through the educational leadership literature, I also noticed a substantial shift in how leadership has been conceptualized in recent years. Research paradigms have changed, as well. We seemed to experience "theoretical contests" in the field (Middlehurst, 2008). Kezar et al. (2006) argued that leadership research was undergoing a revolution in terms of how the phenomenon was conceptualized and the "revolutionary leadership concepts" that seemed to have been almost missing in earlier leadership theories were gaining attention (e.g., ethics, spirituality, empowerment, social change, collaboration, emotions, globalization, entrepreneurialism, and accountability). If one of the main goals of leadership is to enact change (Fullan, 2001), perhaps the claim that "change should begin not by changing the leaders and structures, but rather the paradigms and processes of leadership" (McClellan, 2010, p. 37) has value to it.

In addition, a surge in methodologies used to investigate leadership added to the understanding of the phenomenon. Bryman's (2004) critical review of qualitative leadership research showcased the variety in methodological approaches in which the phenomenon had been investigated, contributions that qualitative research made to the field of leadership, how it compared to quantitative research, along with the conditions when the two designs could be combined. Some researchers claimed that the wide range of perspectives and methodological approaches in studying the leadership phenomenon, as well as the diversity in terminology and substantial number of existing theories and models posed great challenges in integrating findings and classifying or building upon existing theories (Briggs et al., 2012; Bryman, 2004; Dinh et al., 2014; Heck & Hallinger, 2005; Simkins, 2005). Heck and Hallinger (2005) argued that the

"fragmented nature of scholarship [leaves readers…] to try to make their own sense out of the patchwork quilt of work" (p. 239). Some claimed that "the study of leadership in higher education is a strange field" (Bryman & Lilley, 2009, p. 331) and a "stubbornly difficult activity" (Simkins, 2005, p. 10). Perhaps with the increased access to information and technology, the expansion of educational leadership research occurred too rapidly. The stage that the field is at may reflect on the maturity level of the newer theories. This might indicate the need for a re-evaluation of the relationships between theory, research, and practice (Middlehurst, 2008) and a more systematic approach to leadership research in order to integrate concepts from across theories and provide some clarity in terms of overlaps and distinctions amongst theoretical perspectives (Bush, 2011).

This section took shape in the initial stages of this study. In the preliminary readings about leadership, I was attempting to develop an overall understanding of the field and *what* about leadership I was interested in studying. In this process, I developed a strong interest in understanding why and how the conceptualization of leadership has shifted and what the implications of such changes were. This was, in a sense, the starting point of the development of the conceptual framework used in this study, which is described in detail in the next section.

2.3. Conceptual Framework for This Study

This section first aims to describe the development of the conceptual framework constructed for this study, including the rationale behind constructing the framework, the steps taken (i.e., algorithm) to crystalize the components that became the building blocks of the framework. The section presents briefly the paradigm shifts that informed the conceptual framework for this study, an overview of the framework design, and the building blocks used to construct the conceptual framework (i.e., Leadership Domains) and the embedded facets (i.e., Leadership Dimensions). The section ends by presenting the overall picture of educational leadership based on an integration of the key aspects of leadership identified in the selected literature.

2.3.1. Development Process

Rationale

In constructing the conceptual framework for this study, two main elements were considered: how leadership was defined and how this study compared to prior research. In the reviewed literature, leadership was defined in numerous ways. For instance, Northouse (2016) found 100+ definitions and 60+ classification systems of leadership and Dinh et al. (2014) identified 66 different theoretical domains of leadership theory. Some of these definitions and classifications were presented earlier in this chapter. Northouse (2016) defined leadership as "a process whereby an individual influences a group of individuals to achieve a common goal" (p. 6). By looking at other definitions of leadership, this definition seemed to encompass four main components of leadership that often appeared in other definitions of leadership: process, influence, groups, and goals (Northouse, 2016). I initially adopted this leadership definition for my study. In the later phases of the literature review, I noted that in leadership processes, the group may be as small as one other individual and the goal may be personal or organizational. Nevertheless, through the data analysis and interpretation, my understanding of the phenomenon developed, and my definition of leadership expanded. These changes in perspective are presented in detail later in this dissertation, and specifically, in the section exploring the key findings in light of the literature.

In reviewing the literature for this study, I also found that some studies focused on one theoretical perspective (e.g., Barbuto & Wheeler, 2006; Caldwell et al., 2012; Temple & Ylitalo, 2009; Uhl-Bien, 2006) whereas other studies provided a more comprehensive picture of leadership (e.g., Bolden et al., 2008; Bryman & Lilley, 2009; Lamm et al., 2016). In this study, I did not focus on one specific theory or perspective of leadership but on integrating theoretical concepts drawn from multiple leadership theories in a framework that would better represent the complex nature of educational leadership. The very purpose of the study was to gain understanding on how people conceptualized and experienced leadership. Hence, I needed a way to describe what people *understood* about leadership rather than what they *did* from a unitary theoretical stance. A universal theory for educational leadership might not be plausible, but as mentioned in the previous section, various theories offered insights on events, actions, or behaviours that took place in educational institutions (Bryman & Lilley, 2009; Bush,

2011). In a way, this study may be perceived as a response to the call to reframe research "as an approach to skillful and intellectual enquiry that is rooted in and shaped by a number of research traditions, and by multiple ways of viewing the educational worlds that we inherit" (Briggs et al., 2012, p. 2, 3). Dinh et al. (2014) considered that the diversity of theoretical perspectives in leadership research contributed to the development of the field of leadership. Nevertheless, this diversity posed a major challenge for future research; therefore, it was suggested that "future research needs to develop integrative perspectives that consider how disparate leadership theories relate or operate simultaneously to influence the emergence of leadership phenomena" (Dinh et al., 2014, p. 55). In this study, I hoped to capitalize on the "theoretical pluralism" and find how multiple perspectives of leadership informed rather than hindered the understanding of educational leadership.

The Seven-step Algorithm

Initially, reviewing the leadership literature seemed a tremendous task. Looking closer at some of the frameworks created previously and the great amount of resources available to form an understanding of the field, I did not have a clear idea where to begin and how to proceed with my search for relevant literature. Hence, I began thinking of a systematic process and tools that would help me navigate the literature. The path taken was not linear but rather the result of continuously assessing and revisiting previous undertakings whenever clarification, depth, or adjustments were needed. In this process, a seven-step algorithm emerged, which is depicted in Figure 1 and described below. This algorithm helped me manage the process, make sense of the literature, and understand how the process of constructing this conceptual framework unfolded.

Figure 1.   **Conceptual Framework Development: The Seven-step Algorithm**
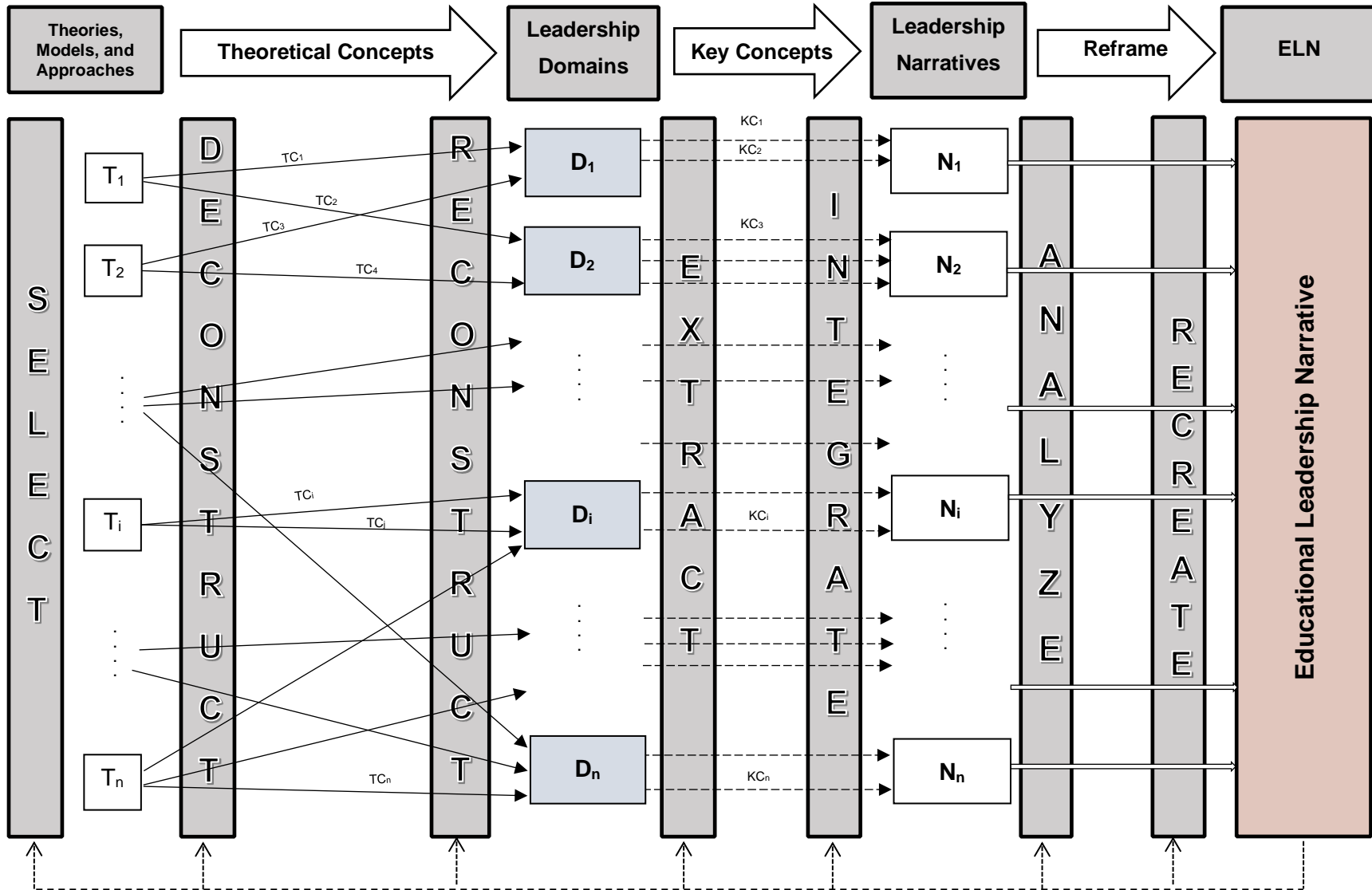
The seven steps of this algorithm were:

[Step 1] SELECT: Review the body of leadership literature to identify relevant resources with focus on Leadership Theories (T_i) and empirical research. Keep track of resources that may need to be revisited in the data analysis and interpretation stages. Note any existing gaps.

[Step 2] DECONSTRUCT: Review selected resources to identify primary Theoretical Concepts (TC_i).

[Step 3] RECONSTRUCT: Look for similarities, differences, and/or unique features within the TC_is and group them, in order to develop the building blocks for the conceptual framework, which were called Leadership Domains (D_i).

[Step 4] EXTRACT: Within each domain, identify Key Concepts (KC_i), which may be distinct or groupings of TC_is.

[Step 5] INTEGRATE: Write Narratives (N_i) for each of the domains by integrating KC_is.

[Step 6] ANALYZE: Examine N_is in detail and if needed, revisit previous steps to refocus and/or offer clarification.

[Step 7] RECREATE: Synthesize N_is in a narrative for the overall Educational Leadership Narrative (ELN) as found in literature.

A detailed description of each step taken in this process is offered next. To begin with, **[Step 1] SELECT** consisted of my reading widely about leadership, in general, and then, specifically educational leadership (higher education and K-12), to familiarize myself with theory and research in the field. When I began this literature search process, I was mostly aware of earlier theories of leadership and approaches of leadership in other fields. I assumed that the literature would also support the use of these theories and approaches in educational settings. I was surprised to discover the contrary and find new approaches to educational leadership. Also, I was overwhelmed by how vast and diverse the field was.

To select relevant literature, I conducted separate searches for conceptual and empirical research on educational leadership (e.g., higher education or school

leadership), as well as more targeted searches (e.g., departmental leadership, senior administration, principal leadership, or teacher leadership). To exemplify this initial search and selection process, and the extent of the literature, below, I provide a snapshot of searching and selecting leadership literature pertaining to higher education. For this, I conducted two individual searches for literature. Using general keywords such as *leadership, higher education,* and *administration,* the initial search returned 25,073 articles. To narrow down the search, I added other keywords and limiters in this order: *qualitative* (1,183); *peer-reviewed*, published between *1995 and 2015* (684), with 365 available (either .pdf, link to text, or HTML). In the second search, I used keywords such as *educational leadership*, *higher education*, and *models* and I obtained 231 articles, out of which, 210 were *peer-reviewed*, published between *1995 and 2015*, and 20 were *qualitative* studies. Conducting a scan of the resources that resulted from the two separate searches, I identified several scholars that focused on educational leadership and I searched for additional resources found in references. This search and scan lead to an initial total of 312 resources on higher education leadership. After eliminating the duplicates and narrowing the timeframe to articles published between 2000 and 2015, I obtained a total of 257 research articles that focused on higher education leadership. The searches that I conducted for other areas of educational leadership followed similar procedures.

It took time, perseverance, and creative use of technology to map and appraise the literature and develop a process that would help me systematically compile the most relevant resources to review. For example, to facilitate a manageable review process, the main details provided by the search engines and databases were transferred to an Excel spreadsheet, a medium that provides searches, filtering, and other useful features. I also cleaned the data to facilitate the use of these features. Specifics details such as *what*, *who*, *where*, and *how* were identified next within the titles and abstracts. These specifics helped me assess the resources and decide which ones to include in the next phase of review. In this initial process of search and selection, six preliminary themes were distinguished. The themes were based on keywords either provided by the author or found in the abstracts: (1) concepts, theory, and frameworks used in leadership literature; (2) leadership models designed for specific groups or generally used in education; (3) leadership skills, competencies, and behaviours; (4) leadership development (formal education, professional development, on-the-job training, or

mentoring); (5) leadership styles and practices; and (6) other (policy, challenges/adversities, miscellaneous). These themes helped me sort the literature.

In this phase, several criteria for literature selection began to emerge (see Section 2.2.1). Considering these selection criteria and following the search and sort processes described above, I selected 137 resources (Group A) from those initially returned by database searches to be reviewed further. These resources included academic books, conceptual articles, and qualitative empirical research on higher education and K-12 leadership. I set aside a group of resources that did not seem to fully meet the selection criteria, or I was unsure about their relevance (Group B). These resources were to be consulted later and potentially used in the development of the conceptual framework or discussion of findings, if proven relevant. All resources that did not meet the selection criteria were eliminated (Group C).

[Step 2] DECONSTRUCT entailed my reviewing the 137 resources selected earlier (Group A) and noting concepts, ideas, and examples to be revisited and assessed once I progressed in my understanding of this body of literature. This process was cyclical, consisting of surveying, reading in depth, sorting, and rereading articles based on the six themes and the Leadership Theories (T_i) distinguished earlier. At this stage, as my understanding of the phenomenon developed, I also began eliminating resources from Group A or adding resources from Group B to the body of literature to review. At some point in this process, the actual number of resources did not seem to matter anymore, and what became more relevant was my careful documentation of potential themes or gaps that I was identifying in reviewing these resources. The main ideas that emerged, which were related to how people, tasks, or processes were conceptualized in leadership, were recorded as Theoretical Concepts (TC_i).

[Step 3] RECONSTRUCT involved using the Theoretical Concepts (TC_i) identified previously to categorize theories, approaches, and models based on similarities, differences and/or unique conditions. In this process, I identified six categories: focus on leader as individual, influence in leader-follower interactions, collaborative processes of leadership, distributed/hybrid leadership, other leadership (e.g., emotional, situational), and leadership development. I also observed two important aspects to consider further: the literature differentiated between assigned and emergent leadership, and both people (individuals or groups) and the organization played a role in

leadership processes. Each category identified in this process could become a building block in constructing the conceptual framework for this study. Hence, this process of analysis and aggregation of concepts into distinct categories was vital. I continued to look at each category individually, writing preliminary descriptions, creating matrices by grouping theories that seemed to belong in each category, and identifying supportive empirical evidence to use in writing the narratives for each category. In writing the preliminary descriptions, I noticed that features of leadership development went across the other categories. At the same time, a separate theme seemed to emerge, related to how leadership was applied in practice. Later, I recognized its presence across the other categories. I continued the analysis of the categories following a cyclical process, during which, I observed several areas where the collaborative-focused categories overlapped. Thus, I aggregated them further in what became the "collective leadership" category. At this point, I began to conceptually differentiate between the categories, symbolizing the spheres *where* leadership occurred—later refined as Leadership Domains (D_i)—and *how* leadership occurred—later refined as Leadership Dimensions (d_i). I also observed that although these concepts could not be considered separate entities, features of the Leadership Domains were more prevalent in conceptual research (in the sense of how leadership was defined and theorized) whereas features of the Leadership Dimensions were more prevalent in empirical research (in the sense of how leadership was developed and exercised). To add to my understanding, I also began creating various graphic representations of how these concepts would interconnect.

[Step 4] EXTRACT was designed to identify Key Concepts (KC_i) within each of the Leadership Domains (D_i). For this, I continued my analysis within each domain, repeating **[Step 3] RECONSTRUCT** and **[Step 4] EXTRACT** and integrating or separating concepts until I seemed to gain enough clarity of each domain and the concepts and their groupings seemed to make sense. By the end of this stage in the process, I distinguished between the building blocks of my conceptual framework, which were identified and labelled as the three Leadership Domains—*Individual, Interactional,* and *Collective*. The two Leadership Dimensions—*Development* and *Implementation*—were embedded within and considered as facets of the three domains. The conceptual framework (as presented in Figure 2) began to emerge at this stage.

I continued to **[Step 5] INTEGRATE** the Key Concepts (KC_i) identified earlier and began writing the preliminary narratives for each of the three Leadership Domains (D_i).

To do this, I focused on the literature within each of the three domains. I extracted more meaning, continuously refining the concepts, and outlined the preliminary descriptions for each of the domains, including how the dimensions materialised within the domains. The purpose of **[Step 6] ANALYZE** was to examine the preliminary narratives in detail, add supportive empirical evidence, and where needed, revisit previous steps to refocus and/or offer clarification. The three Leadership Narratives (N_i) that resulted from this analysis correspond to the three Leadership Domains (D_i) and may be found in the next section. Finally, during **[Step 7] RECREATE**, I synthesized these narratives in an overarching narrative (ELN), which integrates aspects of educational leadership as they emerged in this literature review process.

2.3.2. The Building Blocks: Leadership Domains

One of the goals of this collection and systematic analysis of literature was to help me better understand the field of leadership research by mapping, integrating, and synthesizing the leadership concepts in specific narratives. Also, the process helped me identify leadership concepts that were useful in designing the data collection protocol. By reviewing the literature implementing the steps outlined in the previous section, a series of themes and subthemes of how leadership was conceptualized emerged. They were further refined and identified as three Leadership Domains (*where* leadership occurred) and two embedded Leadership Dimensions (*how* leadership occurred) and subsequently used in constructing the conceptual framework for this study. I begin this section by presenting several key observations made in the literature that helped with my general understanding of the field and in my constructing the conceptual framework. Then, I provide an overview of the conceptual framework design and continue with a detailed description of the conceptual framework, namely the Leadership Narratives (N_i) corresponding the each of the Leadership Domains (D_i). I conclude this section with the overarching narrative of leadership (ELN), which emerged from integrating the key aspects of leadership found in the literature reviewed for this study.

Laying the Foundation

This conceptual framework took shape in the processes of literature search, selection, and systematic analysis, which were described earlier in this chapter. It is worth noting that the analytical process I undertook helped me make sense of the body

of selected literature and better understand not only why I began this process, but how the process unfolded and what its outcomes were. Also, the analytical process helped me rationalize the steps I took and sense how the conceptual framework developed. I made several key observations in the review process, which were foundational to my understanding of the leadership phenomenon as it emerged from my study of the literature. To begin with, I noted several ways in which other scholars classified systems of leadership theories and began to look closely at how these clusters were created. Possibilities seemed numerous. An abundance of concepts, meanings, uses, and potential connections emerged in this review. Mirroring the changes and needs of the society and organizations, the view of leadership has changed and thus, new theories of leadership emerged.

I noticed that many authors distinguished between the concept of *leader* and *leadership*, and I also observed the shift from a person to a process, then to relationships, and more recently, to practice (e.g., Avolio et al., 2009; Bolden & Petrov, 2014, Kezar et al., 2006; Northouse, 2016; Woodard et al., 2000). When considering the progression of leadership theory in general, my observation was that many typologies of leadership theory focused on the leader as individual and the process of influence between leaders and their follower(s) and seemed to come to a halt with transformational leadership theories. Transformational leadership received considerable attention from researchers and practitioners. Dinh et al. (2014) also noted in their literature review that neo-charismatic theories—and particularly transformational and charismatic leadership—was the top thematic category. The literature on earlier leadership theories seemed well-established, concepts were fewer and clearer, and there was more supporting evidence and validated instruments, which were used widely in leadership development or to measure leadership indicators in practice, some of which were presented by Northouse (2016). However, as noted earlier in this section, some of the leadership theories that focused solely on the leader were not considered suitable to education (Kezar et al., 2006). As well, what Avolio et al. (2009) identified as "traditional leadership theories" seemed to be used scarcely in the empirical research that I selected to review for this study. This might be because in the timeframe of my selected literature, newer models and theories of leadership were developed.

Chronologically, what followed this halt in classifying leadership theories was an intricate collection of emergent theories. Terminology changed and expanded.

Methodological approaches became more complex, making the process of understanding what leadership *is* or *is not* and how it was developed or exercised more difficult. These newer theories resulted from adding layers of complexity to existing leadership frameworks, spanning boundaries across disciplines, or branching in different directions with *leader* or *leadership* no longer the sole concepts of interest. Perhaps, transformational leadership constituted a bridge to the newer theories. At a first glance at some existing typologies, it looked like beyond this transitional point, theories or models that did not fit in the traditional theories group—with focus on individual and/or the process of influence—have been amalgamated under one umbrella, generating a dense collection of "buzz concepts". Some of these concepts were in infancy stages, poorly defined and used interchangeably, which made understanding the field difficult. Thus, it was indeed possible that a more systematic approach would bring clarity and future direction to leadership research. Along these lines, I noticed that several branches of emergent leadership theories received more attention than others in education (e.g., distributed, relational, or teacher leadership). However, newer research might show that the leadership theory development reached another critical junction in this series of paradigm shifts, moving toward a more holistic or hybrid view of leadership (Bolden & Petrov, 2014; Gronn, 2009, 2016) and further to the "practice of leading" (Youngs, 2017). For me, understanding these main paradigm shifts in conceptualizing leadership, as well as some of the factors that contributed to these changes were essential in positioning this study in literature, constructing the framework, and in engaging in this research study.

Design Overview

The conceptual framework constructed for this study (Figure 2) was based on three major themes or domains that emerged from the literature (individual, interactional, and collective) and two subthemes or dimensions embedded in each leadership domain (development and implementation). Other models of leadership incorporate individual and collective elements. For example, Bolden et al. (2008) proposed a multi-level model of leadership in higher education built on empirical data and theories of distributed leadership. In this model, leadership practice manifested as a hybrid, emerging at individual, group, and organizational levels. Each of these levels incorporated five elements of good practice: personal, social, structural, contextual, and developmental.

Figure 2.   Conceptual Framework: Leadership Domains and Dimensions
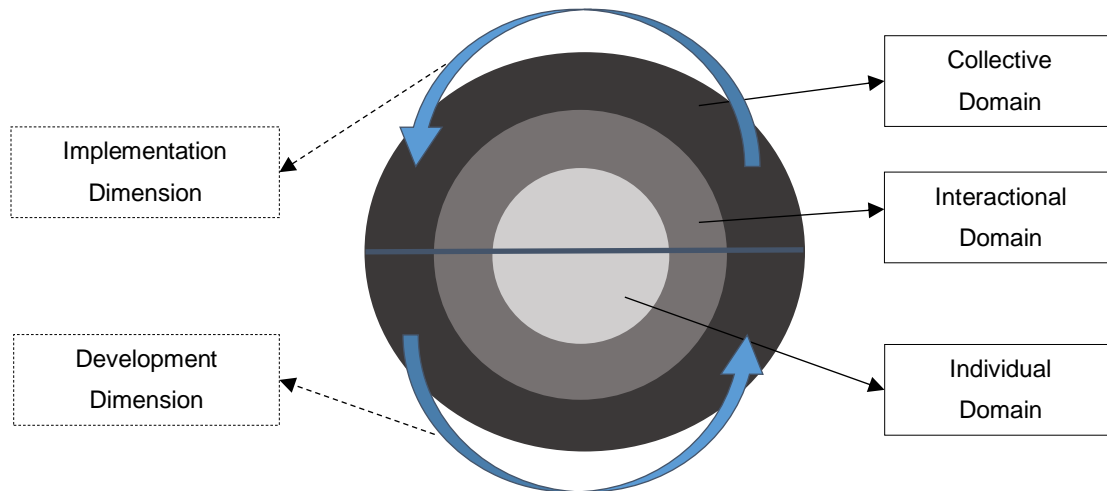
Another model was Senge et al.'s (2012) learning organization. Senge et al. (2012) identified five disciplines of learning—personal mastery, shared vision, mental models, team learning, and system thinking. Although used widely in the corporate world and later in K-12 settings, the concept of the learning organization received mixed reactions in higher education, particularly because it generated some confusion as the concept of "learning organization" overlapped with the mission of an educational institution—to provide learning (Lawler & Sillitoe, 2013).

The framework constructed for this study aims to provide a way to bridge the gap between theory and practice by showcasing the different ways that leadership has been conceptualized and how the concepts emerging from either theory or practice interconnect. For the most part, the three Leadership Domains represent the spheres where leadership occurs. They also reflect the shifts in the conceptualization of the leadership phenomenon—from individual to process of influence to practice. These shifts were briefly described in the previous subsection and illustrate how subsequent leadership approaches extend on prior ones. In studying the literature, I noticed that aspects corresponding to the three leadership domains were more prominent in conceptual research. This observation guided my understanding of leadership theory and provided a way to review the literature further. The two Leadership Dimensions show how leadership occurs within the three Leadership Domains. Leadership Development refers to how people develop their leadership whereas Leadership

Implementation refers to how they enact their leadership. In studying the literature, I noticed that aspects corresponding to the two leadership dimensions were more prominent in empirical research. Hence, I used the two Leadership Dimensions to guide my data collection and analysis.

The next three subsections synthesize the selected leadership literature in narratives corresponding to the three building blocks of the conceptual framework, Leadership Domains: *Individual, Interactional,* and *Collective.* Each subsection is structured to first provide an overview of key concepts, followed by aspects related to the two Leadership Dimensions: *Development* and *Implementation*, and a summary.

Individual Leadership Domain

Key Concepts

The first leadership domain (Individual Leadership) in this conceptual framework focuses on the leader as individual, illustrating who leaders are expected to be and how they are expected to behave to warrant follower development and organizational progress. Typically, the indicators corresponding to established individual-centric theories (e.g., great man, traits, skills, behaviours, and styles) were measured using quantitative instruments (Northouse, 2016). Empirical research focusing entirely on the leader was scarce in the reviewed literature, probably because of the timeframe of the literature or the fact that heroic approaches to leadership did not seem suitable in educational institutions (Bedard & Mombourquette, 2015; Kezar et al., 2006; Leithwood, Day, Sammons, Harris, & Hopkins, 2006; Lynch, 2012). In fact, Bedard and Mombourquette (2015) noted several shifts in newer district leadership approaches aiming "to sustain student learning" (p. 252). Some of these shifts involved a change in focus from leadership models that emphasized compliance and control, managerialism, or a disconnect between goals, practices, and outcomes to more collaborative approaches, relationship development, and active involvement of stakeholders in decision making processes. Hence, in reviewing the literature, for the individual leadership domain, I pulled a series of key individual-centric concepts from across theories that included an individual component and from empirical research on role-based leadership (e.g., president, department chair, school principal).

In the individual leadership domain, personal characteristics and interpersonal skills of individuals engaged in leadership—a phenomenon embedded in everyday practices—were of utmost importance (Lamm et al., 2016; Uhl-Bien, 2006). Leaders' skillsets overlapped to some extent. For instance, there were: eleven characteristics of servant leaders—calling, listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, growth, and community building (Barbuto & Wheeler, 2006); four features of invitational leadership—respect, trust, optimism, and intentionality (Lynch, 2012; McKnight & Martin, 2013); several personal qualities of change leaders—listening, serving spirit, emotional intelligence, encouragers of dialogue, cooperation, and respect (Cloud, 2010); and several attributes of caring leaders—such as benevolence, perseverance, and perspective (Uusiautti, 2013). As well, specific leadership skills, behaviors, and competencies were associated with formal roles in institutions such as president (Barrett, 2006; Torres & Evans, 2005), programme managers (Vilkinas & Cartan, 2015), department chairs (Riley & Russell, 2013), and student affairs professionals (Kleemann, 2005; Miller, 2011).

Leadership Development Dimension

Leadership development is essential for personal and institutional growth. Individuals engaged in leadership are responsible for developing their own leadership capacity and growing self-awareness by valuing ethical practices, appreciating other professionals' perspectives, understanding organizational complexities, and practicing collaboration (Catalfamo, 2010; Harrison, 2011; Skorobohacz, Billot, Murray, & Khong, 2016; Woodard et al., 2000). Catalfamo (2010) claimed that leadership could be developed in formal (academic programs), informal (work experience, on-the-job training, mentoring, networking), or non-formal (workshops, seminars, training courses) settings. Other researchers also focused their work on one or more of these ways to develop leadership (Amey, 2005; Cloud, 2010; Lawler & Sillitoe, 2013; Temple & Ylitalo, 2009; Yielder & Codling, 2004). While each of these three strategies played a role in leadership development, the outcomes often differed. For example, formal programs provided legitimacy and access, informal opportunities supported leader's growth, and non-formal activities helped, yet had the least impact of all (Catalfamo, 2010). Promoting people to formal leadership roles prematurely (Allison & Ramirez, 2016) or without adequate support and relevant development opportunities (Stanley & Algert, 2007; Yielder & Codling, 2004) left new leaders unprepared to deal with challenges, which, in

turn, sometimes resulted in poor practice. Organizations needed to identify the right people for specific roles/tasks, as well as to provide these individuals with opportunities to develop the skills required to fulfil their roles (Basham & Mathur, 2010). However, relying on one strategy alone may not be enough (e.g., on-the-job training); hence, a combination of development strategies was suggested to better equip leaders for their roles.

Although leadership development may also be tailored to a specific role, developing skills in all aspects of academic leadership—teaching, research, service, and management—and becoming aware of other types of leadership existing in academia facilitated interdisciplinary and institutional collaboration (Bryman & Lilley, 2009; Cardno, 2013; Riley & Russell, 2013; Yielder & Codling, 2004). Several leadership theories incorporated ethical aspects and emphasized the implementation of leadership on such ground (Caldwell et al., 2012; Northouse, 2016; Uusiautti, 2013). Strong moral compasses and core values were not only the foundation of leadership but were also considered essential in overcoming challenges that arose in complex educational systems (Skorobohacz et al., 2016; Souba & Day, 2006).

Leaders, in general, benefited from developing critical thinking as opposed to relying on prescribed solutions to address challenges they encountered in their work (Amey, 2006). It was vital that educational institutions and leadership development initiatives build in opportunities for development of specialized skills, teamwork and collaborative skills, as well as strategies to overcome issues related to power relations, so that new leaders were prepared to engage in problem solving activities with people who had different views, tasks, or level of power (Harrison, 2011; Humphreys, 2013; Lamm et al., 2016; Riley & Russell, 2013). Rather than focusing leadership development on competency frameworks, leaders needed to be provided with opportunities to develop a wide range of skills and the ability to adapt to change, maintain focus, and use a combination of skills depending on the issues they need to address (Basham & Mathur, 2010; Bryman, 2007; Heifetz & Laurie, 2001; Madsen, 2007; Middlehurst, 2008; Northouse, 2016). As an example, Lamm et al. (2016) proposed a model of interpersonal leadership that educators could use to guide leadership development programs. Co-mentoring was also a strategy that provided leaders with insight and support (Allison & Ramirez, 2016). Moreover, being aware of and continuously reflecting on mental models and the ability to articulate personal vision were perceived as effective

ways to deal with dilemmas and complex problems that surfaced in practice (Senge et al., 2012).

Leadership Implementation Dimension

Leadership implementation within the individual leadership domain refers to ways in which leadership skills are applied in practice. Institutions are complex social networks. Thus, individuals involved in leadership need to possess a wide variety of personal characteristics and interpersonal skills and the ability to use them wisely and purposefully in situations that arise in leadership processes (Barbuto & Wheeler, 2006; Catalfamo, 2010; Lamm et al., 2016; Pennington, 2003; Skorobohacz et al., 2016; Uhl-Bien, 2006). "Good practice" was informed by theory and research (Bush, 2011) and shaped people's perceptions of and experiences with leadership (Bolden et al., 2008). There were multiple styles describing leaders' behaviours exercised when engaging in leadership: coercive, authoritative, affiliative, democratic, pacesetting, or coaching (Pennington, 2003; Northouse, 2016). Although opinions on what made educational leaders effective varied, it was argued that no specific style was better in every situation or associated with leadership effectiveness (Bush, 2011; Bryman & Lilley, 2009; Lynch, 2012; Pennington, 2003; Woodfield & Kennie, 2008). Thus, leaders needed to be able to adapt their style as situations occurred in practice and maintain a climate that facilitated good performance of followers.

Summary: Individual Leadership Domain

The individual-centric domain of leadership is the cornerstone of leadership practice and foundational in this conceptual framework. Nevertheless, this domain alone is not enough to describe leadership as skills, behaviours, and styles do not become apparent until applied. Investigating this domain provides a clearer understanding of what combination of leadership skills, behaviours, and styles may be more suitable to educational settings. When considering leadership as embedded in social networks, as "an emergent property of a social system, [and] not something that is added to an existing system" (Temple & Ylitalo, 2009, p. 282), individuals—leaders or followers—need to understand how they relate to the group and the organization they belong to before being able to contribute in meaningful ways. How and why the interactions between leaders and followers take place and how they enhance the understanding of the leadership phenomenon are presented in the next subsection.

Interactional Leadership Domain

Key Concepts

Leadership was considered "intentional" (Fenwick, 2010) and arising from interactions between people (van Ameijde, Nelson, Billsberry, & van Meurs, 2009). The shift from the leader as individual to interactions and influence processes has brought to light additional concepts to portray the leadership phenomenon. Spillane (2006) argued that even though actions were important, "[t]hinking about leadership in terms of interactions rather than actions offers a distinctly different perspective on leadership practice" (p. 8). In this view, "[l]eadership *is* relational, and cannot be captured by examination of individual attributes alone" (Uhl-Bien, 2006, p. 671, original emphasis). This perspective brings followers in the center of leadership processes. The main features of the interactional leadership domain are the focus on relationship and follower development, as well as the role of the leader in this process. Not only do followers play a role in leadership, but in some ways, they define what leadership is (Skorobohacz et al., 2016; Uhl-Bien, 2006). Followers' expectations and what they see as "real" in what and how leadership occurs can change the outlook on leadership greatly. Some theories that informed the interactional domain of leadership were transactional, transformational, servant, invitational, leader-member exchange, and relational leadership (Avolio et al., 2009; Barbuto & Wheeler, 2006; Lynch, 2012; Northouse, 2016; Uhl-Bien, 2006). Examining these theoretical lenses facilitates a better understanding of the type of interactions between leaders and followers, as well as clarifies the process of influence within these interactions.

Leadership Development Dimension

Leaders play a vital role in developing relationships that encourage their followers' personal and professional development. Within the interactional leadership domain, the follower's role shifted from passive to participative in the process of achieving personal or organizational goals (Amey, 2006; Lynch, 2012; Woodard et al., 2000). In theory, different types of leadership had different emphases and potential outcomes. For example, both transactional and transformational leadership aimed to improve followers' performance and achieve desired organizational outcomes. But transactional leadership focused on exchanges that promoted compliance and were contingent to reward whereas transformational leadership focused on inspiring followers'

commitment by promoting high expectations and a supportive environment conducive to creative problem solving and innovation (Barbuto & Wheeler, 2006; Northouse, 2016).

In addition, servant leadership moved beyond results and was concerned with the means of achieving results, followers' well-being, internal motivation, and development. Servant leaders were committed to serving others by empowering them and building their self-confidence without compromising their ethics (Avolio et al., 2009; Barbuto & Wheeler, 2006). Similarly, invitational leaders were invested in unleashing the followers' energy and improving their confidence in their capabilities, particularly in challenging situations (Heifetz & Laurie; 2001; McKnight & Martin, 2013). Leaders who could build relationships and "trust capital" in their organizations and cope with negative emotions when dealing with uncertainty were more likely to succeed (Jameson, 2012) and help others do the same (Heifetz & Laurie, 2001). Facilitating the development of followers' professional competence and encouraging them to adapt to change and engage in problem solving, learning, and reflection contributed to performance improvement (Hiatt & Creasey, 2003; Lawler & Sillitoe, 2013). As good interpersonal and communication skills were essential in establishing quality interactions (Riley & Russell, 2013), leaders and followers together needed to find ways to develop and then apply these skillsets.

Leadership Implementation Dimension

Within the interactional leadership domain, relationships are central to leadership. The interactional domain of leadership is concerned with the influence process taking place in leader-follower dyad within a context, emphasizing communication processes that occur within that context (Stanley & Algert, 2007; Uhl-Bien, 2006). In this process, the nature and quality of relationship were important (Avolio et al., 2009; Northouse, 2016). The influence process altered how others acted and thought. Leaders who were aware of "how they think and behave" (Uusiautti, 2013, p. 483) espoused characteristics such as authenticity, integrity, respect, credibility, and trust while encouraging reflection, teamwork, and relationship-building (Amey, 2005; Bryman & Lilley, 2009; Souba & Day, 2006).

One of the purposes of leadership was to create change (Bryman, 2004; Fullan, 2005; Lawler & Sillitoe, 2013). In implementing change processes, transactional leadership focused on maintenance and incremental change (Cloud, 2010; Northouse,

2016), transformational leadership concentrated on changes resulting from the implementation of a leader's vision at system levels (Cloud, 2010; Woodfield & Kennie, 2008), invitational leadership emphasized changes at all organization levels—people, places, policies, programs, and processes (McKnight & Martin, 2013), and servant leadership concentrated on foresight, stewardship, and community building (Barbuto & Wheeler, 2006). Considering leader-member exchange theory, it might be argued that high-quality relationships formed between leaders and followers and high-quality exchanges between leaders and followers had better outcomes—in terms of interest in work, employee turnover, performance, and promotion—for individuals and organizations (Northouse, 2016). In interactions with stakeholders, commitment to values and high ethical and moral standards were essential. However, as some of the "standards of excellence" might be regarded as idealistic (Caldwell et al., 2012), some leaders seemed ill-equipped to adhere to these ideal standards in all situations, which was concerning. Hence, it is important to develop leadership skills that would allow for engagement in leadership practices, such as relationship development, and exercise influence on ethical grounds.

Summary: Interactional Leadership Domain

In this conceptual framework, the interactional leadership domain focuses on the interactions and influence processes between leaders and followers. Leaders are responsible for developing relationships with their followers, as well as for enabling their followers' personal development and improved performance. Depending on what followers need and expect from their leaders in situations that occurred in practice, one leadership style may be preferred over another (Northouse, 2016). Hence, leaders achieve the desired outcomes when they are adept at adjusting their style to respond to a situation they encounter. The interactional leadership domain is important as it becomes foundational to the domain of collective leadership.

Collective Leadership Domain

Key Concepts

Although important in describing leadership, the individual and interactional leadership domains are not sufficient to understand leadership. Educational organizations are complex social systems in which people at various levels influence one another and often work together toward a common goal regardless of their formal

role. In these collaborative environments, individuals are involved in their own and others' welfare and function as an interconnected network by communicating, collaborating, reflecting, and expanding their "capacity to foresight" (Woodard et al., 2000). Some theories used to draw from for this leadership domain were shared, dialogic, team, and distributed leadership (Bolden et al., 2008; Humphreys, 2013; Northouse, 2016; Temple & Ylitalo, 2009).

Humphreys (2013) suggested that collaboration was a suitable strategy to develop a broad understanding of organizational complexities and governing policies that impacted stakeholders, improved organizational efficiency and service quality, and developed effective ways to make education available to more students, who in turn, would contribute to society. Leaders and followers might shift their roles as situations occur. Developing collective efficacy of people in an organization was essential in overcoming challenges. This meant "being together in leadership all the time" (Woodard et al., 2000, p. 84). Reaching this milestone required moving beyond "informal consultations", to building capacity in a true collegial environment. In collegial environments, people were able to promote participation rather than individualism in decision-making, overcome differences of opinion, and reach consensus ethically (Bush, 2011; Humphreys, 2013; Youngs, 2017). A higher degree of collaboration might be achieved by empowering others to remove structural barriers, encouraging dialogue, and challenging complacency and deeply held assumptions (Woodard et al., 2000).

Leadership Development Dimension

Leadership development within the collective domain refers to creating an environment conducive to learning for all members. This aspect expands the perspective of leadership development from people working together to achieve goals to "cultivat[ing] an enabling capacity and empowering environment that stimulates faculty and administrators to frame problems rather than waiting for the leader(s) to do so for them" (Amey, 2005, p. 693-694; see also Heifetz & Laurie, 2001). Framed this way, leadership became about gradually building collective intellectual capacity, beginning with personal capacity and moving toward interpersonal and organizational levels (Catalfamo, 2010; Senge et al., 2012). Successful leaders promoted learning and collaboration by being a positive influence when engaging with others, and showing kindness, caring, and excellent customer service (McKnight & Martin, 2013).

This developmental perspective of leadership emphasizes cognitive processes that involve individuals and organizations in creating dynamic learning environments for both leaders and their followers, which "flattens the hierarchy" yet makes the conceptualization of leadership more complex (Amey, 2005; Avolio et al., 2009; Middlehurst, 2008). Communities of practice were a good example of places where structural barriers were eliminated and people with similar goals came together to collaborate, learn, and support one another in enabling institutional change (Bouchamma & Brie, 2014; Davison et al., 2013). Bouchamma and Brie (2014) claimed that ethical leaders in communities of practice could take the role of a communicator, collaborator and coach, conflict mediator, and agent of change supporting innovation. Hence, a leader's role changed from being directive and focusing on task completion to enabling cognitive processes and critical thinking, strengthening relationships, sharing responsibilities, and further to creating structures that facilitate participation in a healthy learning environment (Amey, 2005; Gentle & Clifton, 2017; Wang & Sedivy-Benton, 2016).

Leadership Implementation Dimension

Senge et al. (2012) argued that educational institutions could become "learning organizations" when "involving everyone in the system in expressing their aspirations, building their awareness, and developing their capabilities together" (p.5). But implementing the characteristics of learning organizations (i.e., learning disciplines) did not come without challenges in universities. Universities operated as "knowledge institutions" rather than "learning institutions" (Gudz, 2004) with varying dynamics among individuals and departments (Bak, 2013; Gentle & Clifton, 2017) whereas learning organizations operated as integrated systems. In order for universities to function as learning organizations, it was fundamental that its activities—research, teaching, operations, and community engagement—be perceived as integrated rather than separated (Gudz, 2004). In this environment, a mutual purpose was established, and interactions and collective thinking are encouraged (Senge et al., 2012). Lawler and Sillitoe (2013) recommended the "flagship" approach as a starting point to implementing the organization learning principles in universities. This way, experienced leaders would initiate change strategically at a smaller scale (e.g., team or department) by facilitating knowledge transfer and cultivating a culture of learning, so that people were empowered to identify and work through encountered problems together (Lawler & Sillitoe, 2013).

Institutional structures might promote "functional silos" hindering not only dialogue, but also accessibility of services (Kleemann, 2005). Therefore, a leader's role became crucial in creating a culture of learning (Andreadis, 2009), establishing alliances to help the institution expand its capacity to respond to such challenges (Temple & Ylitalo, 2009), and providing the means for integrating the individual and collective learning within the organizational practices (Gudz, 2004). Particularly in times of institutional growth and scarce resources (e.g., budget cuts, understaffing, lack of physical space, and overuse of technology), ethical decision-making, proper communication, and improved accessibility were key in maintaining service integrity (Miller, 2011). System thinking was thought to help leaders and other organizational members see their institutions as interdependent systems while recognizing "hidden dynamics" and engaging the right stakeholders in decision-making processes (Senge et al., 2012). By involving stakeholders in change processes, system thinking could offer solutions to complex issues such as improving teacher retention (Minarik, Thornton, & Perreault, 2003) and student achievement (Thornton, Peltier, & Perreault, 2004).

Implementing collaborative leadership practices that embed formal leaders and informal experts promoted inclusiveness of employees in any capacity (administration, teaching, research, and professional staff) and facilitated cross-functional collaboration at team and organizational levels (Andreadis, 2009; Basham & Mathur, 2010; Bolden et al., 2008; Jones et al., 2012; Lynch, 2012; van Ameijde, et al., 2009). Despite efforts to develop cross-functional collaboration and shared leadership, when practice was grounded in "older paradigms of leadership" that did not fit with today's interconnected institutions, people without formal authority faced difficulties in their attempts to effect change by challenging structures from the outside of the dominant culture (Harrison, 2011; Lynch, 2012; McClellan, 2010). When a collegial environment was created, sharing of responsibilities, developing talent, and valuing individual contributions brought energy and enthusiasm, built community, and encouraged finding solutions to rather than circumventing complex issues (Humphreys, 2013; Kezar et al., 2006; Miller, 2011; Youngs, 2017; Woodard et al., 2000).

Summary: Collective Leadership Domain

Cultivating a constructive environment benefits leaders, followers, and groups. It generates a positive climate, where dialogue is encouraged, feedback is welcome, self-

awareness develops, and self-efficacy and well-being of people improve (Uusiautti, 2013). Leadership becomes a "moral act" of leaders who create a "culture of change", in which all members have a role in the organization and are encouraged to use their professional competencies, take the lead and participate in problem solving and decision-making processes (Cloud, 2010; Fullan, 2001; Heifetz & Laurie, 2001; Torres & Evans, 2005). They are individuals valued for their contributions, but work interdependently, are interconnected, and depend on one another. Even though collaboration is a "messy and time consuming" process, it may open avenues for better leadership practices when it is implemented by educational leaders and modeled for students (Humphreys, 2013).

What This Means: Educational Leadership as Found in Literature

The previous subsections described the components of the conceptual framework. The three Leadership Domains showcased the multifaceted nature of leadership and the spheres where it occurred. The two Leadership Dimensions emphasized how leadership was developed and implemented within the domains. Leadership is a complex and sophisticated phenomenon and taken separately, the three leadership domains provide an incomplete view of leadership. Hence, in this section, to form a more comprehensive view of leadership, I integrate the key aspects identified in the literature reviewed for this study in an overarching narrative of educational leadership.

In the earlier stages of leadership conceptualization, the pioneers of leadership research focused on gifted individuals born with a calling and traits that distinguished them from others and made them "great leaders" (Northouse, 2016). Over time, researchers began studying leadership more systematically and challenged this approach and the underlying assumptions that a pre-established set of innate qualities— a list that seemed to grow constantly—was a pivotal factor in one's potential of being a leader in all situations. Hence, although the leader, as a discrete entity, remained an important construct, leadership was subsequently defined as a process of influence between leaders and followers. Leadership was also perceived as reciprocal influence and support in achieving personal or organizational goals, which were set by either the leader or the follower (Northouse, 2016; Simkins, 2005; Uhl-Bien, 2006). As such, leadership was seen as a socially constructed concept, as a process of enhancing

human potential by helping others become leaders themselves (Lynch, 2012; Sathye, 2004; Uhl-Bien, 2006). The leader was not the sole concept of interest in studying leadership anymore and other constructs such as followers, peers, and context added to the understanding of the phenomenon (Avolio et al., 2009; Bryman, 2004; Gibbs et al., 2008; Skorobohacz et al., 2016).

This novel perspective unlocked new possibilities and expanded the horizons of studying leadership. Leadership became a process of applying "collective efficacy", capitalizing on the "collective intelligence of the group" in transforming the organization (Heifetz & Laurie, 2001; see also Amey, 2005; Gronn, 2003, Senge et al., 2012; Woodard et al., 2000). Envisioned this way, leadership might be assigned (formal), given by a formal role in an organization, and emergent (informal), given by other people's support and acceptance (Jones et al., 2012; Lynch, 2012; Northouse, 2016). The demands faced by educational institutions required sharing of responsibilities, expertise, and resources, as well as an emphasis on leadership capacity development and partnership building (Holt, Palmer, Gosper, Sankey, & Allan, 2014; Jones et al., 2012; Lynch, 2012; Senge et al., 2012; Youngs, 2017). Therefore, leadership often occurred in a bounded context, within an environment that encouraged initiative and engagement in leadership processes, contributing in turn to better performance (Kezar et al., 2006; Middlehurst, 2008; Simkins, 2005; Vilkinas & Cartan, 2015).

In today's educational organizations, it was challenging to identify which approaches to leadership might best support the desired outcomes (Bolden et al., 2008). No one way is right in all situations. Some situations call for top-down decisions, others call for collaboration or bottom-up strategies. Leaders needed to be prepared to find balance when experiencing tensions that surfaced in dealing with competing expectations of stakeholders and demands of various situations and in turn, adapt their leadership practices (Northouse, 2016; Senge et al., 2012). In addressing complex issues, people often engaged in dialogue and institutional initiatives that transcended disciplines, formal roles, or unit boundaries, aiming to capitalize on one another's strengths and integrating dispersed knowledge to accomplish complex tasks (Cloud, 2010; Temple & Ylitalo, 2009; van Ameijde et al., 2009). A distributive approach to leadership seemed to be effective in schools, interdisciplinary team projects, and community building activities as this approach empowered people and created structures that facilitated ownership, initiative, collaboration, and leadership development

(Davison et al., 2013; Holt et al., 2014; Jones et al., 2012; Lynch, 2012; van Ameijde et al., 2009). By challenging hierarchical leadership views promoted by earlier leadership theories and losing the initial meaning of follower in the process, distributed leadership was perceived by some as a complement to traditional views (Jones et al., 2012; Lynch, 2012; van Ameijde et al., 2009; Youngs, 2017). Despite its positive outcomes, collective leadership was not considered a panacea for all challenges in education (Bolden & Petrov, 2014; Holt et al., 2014; Gronn, 2016).

Gronn (2009, 2016) claimed that leadership was configured as a mix of individual and collective elements that co-existed in practice and that, in general, the collective side of leadership had been marginalized or totally ignored even by studies about newer conceptualization of leadership (e.g., distributed leadership). Perhaps this happened because of the inherent individualistic nature of conceptualizing leadership as residing in a formal role or one individual. An alternative conceptualization, that of leadership-as-practice, might offer a better perspective of leadership. When the shift from leadership to practice happens, the focus changes "from leader and leadership, to the practice of leading" (Youngs, 2017, p. 147), an approach based on practice rather than theory. In this sense, leadership was perceived as a practice dispersed throughout the institution that "holds all other practices together" (Youngs, 2017, p. 146).

Leadership success was "based on systematic, long-term hard work, and ongoing dialogue" (Temple & Ylitalo, 2009, p. 285). Drawing from the literature reviewed in this study, I can conclude that leaders need to be involved in the process of developing and applying leadership continuously in their organizations. As well, they need to be adept to overcoming difficulties that arise in a culture that fosters change. Leaders also need to be resilient in preparing others to thrive in an ambiguous and uncertain environment. There are no quick solutions. Numerous leadership theories and models have been constructed and tested in educational settings, providing valuable insight in what leadership is and how it emerges in practice. However, my observation from reviewing this body of literature is that educational leadership research generally lacks agreement on what leadership is, how educational institutions are or should be led, what it means to lead in education, or whose expectations and needs take priority in decision-making processes. Moreover, methodological undertakings to studying educational leadership vary greatly. Hence, the field remains rather diverse and its future direction is somewhat uncertain (Briggs et al., 2012; Bush, 2011; Gronn, 2003; Heck &

Hallinger, 2005; Middlehurst, 2008). This literature review showed that no one leadership theory or perspective provided a sufficient base to explore what leadership was or how leaders put theory into practice. Nevertheless, the literature reviewed in this chapter provided a framework by which the phenomenon could be explored and explained further.

2.4. Chapter Summary

This chapter presented the process of reviewing the literature relevant to this study, how the conceptual framework was developed in undertaking this review process and concluded with a narrative meant to illustrate what educational leadership was and how it has evolved. Some features and delimitations of this literature are as follows. First, this literature review aimed to give an overall picture of leadership. Therefore, it did not examine in depth any specific theories or associated concepts, but it helped me familiarize with the state of the field of leadership and it offered me a conceptual foundation for my study. Second, the literature selected aimed to help me construct a framework to guide the research processes. To do so, I needed to understand the complexities of the phenomenon, as well as how it was conceptualized and why. I also needed to identify the primary concepts and how they were defined and studied previously. Third, developing an understanding of the existing leadership theories and models, as well as identifying the concepts of leadership were meant to inform and guide my conducting the data collection and analysis processes. The next chapter describes how the conceptual framework developed during this literature review process informed the data collection and analysis, as well as the methodology used to explore how leaders actually connect theory with their practice.

Chapter 3.   Methodology

3.1. Introduction

In this chapter, I first position myself as a researcher by describing my background, my experiences with the leadership topic, and how I established the research questions and methodology. This first section is meant to provide the reader with a personal context within which this study was undertaken. I then present how the study was framed and describe participants and the recruitment methods. Finally, I focus on the data collection and analysis methods, including trustworthiness, ethical considerations, and study characteristics.

3.2. Researcher's Position (Part 1): Intended Directions, Unexpected Crossroads, and an Array of Decisions

There are many ways to tell a story...

Over the past few years, I have (re)written my story several times. Perhaps, more than I ever wanted to. This is the first part of the story of how this dissertation came to life.

3.2.1. Why This Story

Qualitative researchers bring in biases, values, and experiences that shape their research (Creswell, 2016; Schnelker, 2006; Patton, 2015). Creswell (2016) argued that reflexivity skills were "an essential part of qualitative research" (p. 222) and "the writing of a qualitative text cannot be separated from the author, from the participants involved in the study, and from the readers of the text" (p. 223). Hence, in this section, I engage in a reflexive writing exercise by sharing some of my past experiences, my stance on the leadership phenomenon, the initial research questions, and methodology. The second part of this story, consisting of how I engaged in this research study and some valuable lessons I learned from it, is included in the final chapter of this dissertation.

Including this two-part story in my dissertation aims to provide the readers with my context and motivations for undertaking this study, along with how its components

unfolded. I feel compelled to include part of my story here not (only) because it is a practice adopted by qualitative researchers, but as a way to pay it forward: for a while, I was a story collector who was taking risks on adventurous paths (e.g., experiencing new public transit routes, using new technology, or being exposed to new perceptions and ways of thinking) while asking people to take some time and courageously "share their leadership stories with me". As participants in this study entrusted me with their stories, I hope to inspire others to continue sharing theirs.

3.2.2. Reflecting on Past Experiences

Early Life

I was born in the past millennium, in a small rural community in Eastern Romania, which eventually made it to Google Maps. The first memory I have is of the dark night when the country was shaken by its biggest earthquake to date. It wasn't until later in life when I discovered how people found the strength to continue their living after such a tragic event. Similarly, my life has been shaken several times since. From becoming "the troublemaker" overnight when we welcomed my sister to our family, to living up to expectations set by other people or systems, to surviving the effects of several natural disasters that affected our family and community, to eventually moving to the city in my early teens, and later experiencing the effects of the Romanian Revolution. Living in a communist country with censored television broadcasts, six days of school per week in a competition-based education system, and limited options for play, my childhood was mostly a time for homework, gardening, and occasional soccer games with other kids on my street. My creativity at that age resided in ingenious ideas about how things were to be done. After successfully failing the entrance exam to nursing school—the first step on a predesigned prestigious career path of medicine—I studied at two technical high schools, where I discovered how important precision and accuracy were in technological processes. On a cold day of winter break in 1989, violent protests erupted in the country, culminating with a change in political system. Hence, our lives took a different turn. It was during the tumultuous high school years when I found my passion for writing and (re)discovered my love for music. Among other things.

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Early Career Experiences

As many fresh high-school graduates, I explored several career paths and eventually, fascinated by the emerging field of technology, I found myself spending over a decade learning and teaching about it. That time showed me the experiential side of learning, a somewhat novel approach to education in Romania at that time. When I was growing up, teaching was the only profession I refused to consider, mainly because—as a teacher's child—I experienced first-hand that the education system was not kind to teachers. One day, though, after four long months working in sales, teaching found me. I began teaching various subjects related to computing science and information technology to high school students. Without teacher's training, the first years were formative and meant for me to discover the art of teaching science through practice at all K-12 levels. Simultaneously, I was innovating by exploring and solving problems alongside students in my classes and experimenting with new curriculum and teaching and learning methods (e.g., team collaboration in project-based environments). In the midst of my early teaching years, I also discovered my entrepreneurial abilities and that my passion for people was greater than my passion for machines, no matter how trendy they were. So, I went back to school, planning to teach at a higher level upon graduation. But plans changed.

New Beginnings

Social, political, and economic factors contributed to my family's sudden decision to immigrate to Canada, where we arrived with our life packed in a few suitcases on a rainy summer day in 2004. Within a few months, I thought we experienced everything there was, yet, there seemed to be no end to the unexpected that was to come.

What I carried with me across two continents and an ocean—not in a suitcase—was the passion for teaching and writing. It seemed an impossible dream at first. Not only did I not have the means to pursue such a career, but I lost the vital component—language. Nevertheless, self-motivation and my approach to learning, an intensive language program, and incredible support from people around me helped me learn the new language fairly quickly and I started teaching again. As well, for the first time, I engaged in adult education training. Finding that the approach to teaching and learning at the institution I was working at did not allow for the flexibility and innovation that I thought it would, I felt trapped within a system that I could not change from where I

stood. I decided to do something about it, so I embarked on my first graduate journey—the master's degree. Shortly after, though, I moved to another institution, hence I did not have the opportunity to initiate the change I envisioned when I began my master's.

3.2.3. Experiencing Leadership

I have spent over a quarter century as a post-secondary student while raising a family. For most of this time, I have also been working in public and private education in two countries. This exposed me to all levels of education. I taught, held managerial roles, and formally or informally lead teams or managed projects. In this process, I have been captivated by how different yet how similar organizations I worked in were. The need to expand and operate in multiple locations, to increasingly rely on technology for communication and knowledge transfer, to constantly re-evaluate existing recruitment, training, and retention strategies to meet the needs of today and strategize for an unknown tomorrow, and to respond to the needs and expectations of a diverse student population are only a few of the forces I observed that affect educational organizations. In all this, leadership appears to be an essential factor to the growth or the decline of an organization.

In part, I had developed my professional practice without considering theory too much. When I was exposed to theory in my graduate studies, my perspective broadened. I gained some confidence and felt I could face my work with new knowledge and incorporate learned concepts into practice in real time. Improvements were visible. Nevertheless, my aspiration to change the status quo brought me both joyful moments and setbacks. The challenges of coordinating activities in a multi-site program became obvious to me as a junior leader. In time, I started questioning the concept of adopted "best practices"—rather than adapted—across multiple locations. Workplace cultural differences became apparent, too. Perhaps, that was also when I began to perceive today's problems as consequences of yesterday's decisions, a principle that made me somewhat cautious about rushing into making decisions. Hence, decisions became about considering long-term outcomes and addressing the issue and its root causes rather than symptoms. Engaging in this study helped me explore leadership and clarify some of the intricacies of the leadership phenomenon. One of the major lessons I learned was that, although there is a dotted line between management and leadership, learning to differentiate between them helped me realize that they required different

skills and dealt with different organizational areas, yet both are important for a successful practice. For me, now, leadership mainly refers to aspects related to the people-side of an organization while management refers to the development or maintenance of processes and procedures needed to achieve specific goals.

Selecting the Topic

I spent some of the doctoral coursework reading, writing, and discussing with others various aspects of leadership. However, in selecting my research project, I explored several topics, pushing aside the thought of studying leadership. Some days, it felt like I was running from my calling, finding excuses such as I did not think I was "grown up enough" to study leadership. But again, the day came when I realized that studying leadership made the most sense. A new journey began. To expand my horizons, in the preliminary phases of this study, I read extensively about educational leadership. Throughout my career, I have been exposed to leadership in corporate settings, so frameworks and leadership strategies used in these environments seemed to make more sense. This perspective may have also limited my understanding of leadership. In all these endeavours, one question kept coming back: how do these frameworks translate to education? Or, do they?

Even though I was more familiar with earlier leadership theories and approaches, the newer leadership trends seem to favour my preferred working style as collaboration is an essential feature of these approaches. In my readings, I found that the practical approaches to leadership were often rooted in personal preference or adopted worldview. I was amazed by how diverse the terminology was. I also found few approaches that provided an overall picture and too many that seemed to attend to minute aspects of the leadership phenomenon. I cannot say that I have a preferred leadership theory, nor do I consider one approach better than another. Nevertheless, in the beginning, I seemed to relate more to leadership approaches that focused on people development and shared decision-making processes. Maybe my work as an educator made me more amenable to these approaches. Then, I discovered some thought-provoking theories that made me ponder if I were somewhat restricting myself into remaining within my comfort zone. Hence, I kept challenging myself to read about and attempt to understand and draw from other perspectives.

I began to experience the "explosion" of literature in my attempt to group theories based on common features or foci and understand the multiple facets of the phenomenon. But the task was not easy. There were far too many concepts to consider, some of which were in their initial stages of development. When reviewing the literature selected for this study, I began thinking that the growth of the research field may have been too rapid, and this was reflected in its level of maturity. Thus, I found myself joining the conversation that there was too much leadership literature and there was a need to look at leadership in a more systematic manner in addition to creating better ties between theory, research, and practice. My interest in researching how people experience leadership and finding out what aspects of established leadership theory emerge from these experiences developed amid these readings and reflection on the topic.

3.2.4. Establishing the Questions

Arriving at the research questions was an intricate process. In some of my early attempts to the study design, I found myself wavering between research and evaluation, and between theory and practice. For most of my undergraduate studies, I considered myself a theorist in the field I was studying. Theory made sense then and it seemed that I functioned well in that realm. During my graduate studies, I was exposed broadly to theory in the field of education. Approaching this research from a theoretical standpoint posed a dilemma. Probably I was not confident that I could succeed in such an endeavour in a new field of study, or that I could navigate the qualitative research forest. Or, I developed a stronger sense of practice over the course of my career. In spite of this, I explored leadership theory and research for a while. When it came to theory, it appeared that taken by itself, no leadership theory, framework, or model would encompass what leadership was in a way that I expected to find in literature. It looked as if I were looking for an integrative, all-encompassing theory of leadership, which, as I found out, in fact, did not exist, although some have attempted to achieve this ambitious task. Switching gears, I decided to work on something that had more practical outcomes and values. Thus, I began to look for ways in which theory and practice could be bridged. That was the crossroad where I turned back to an earlier stopover on my leadership journey. At the apex of my MEd, in my comprehensive exam, I wrote:

> …if I were to construct a framework for non-negotiable duties of a leader as emerged from practice, this would consist of the following seven principles:
> - Discover who you are and be aware of both potential and biases
> - Analyze your organization and become acquainted with people in their cultural context
> - Build relationships of trust because trust may represent the only valid benchmark that quantifies the quality of a relationship
> - Develop androgynous traits to make use of in relationships with your team and your organization stakeholders
> - Create just right standards; ask only for what is reasonable in a given context, yet encourage people to dare for more and give them the freedom to do so
> - Give everyone, including yourself, the freedom to make mistakes; what is more important is to learn from mistakes and evolve with each one
> - Control the circumstances, yet only lead the people

New questions surfaced while reflecting on this framework, including what has or has not changed since in the field of leadership. In part, the initial research questions posed for this study and presented next took form in this endeavour.

Initial Research Questions

Considering my past experiences and my review of the literature, initially, I posed three research questions for this study, which were later revised. These research questions aimed first to investigate in depth how people perceived their own leadership (RQ1) and how they experienced others' leadership (RQ2). Specifically, I hoped to identify some insights related to how participants understood and defined leadership and what informed their perspectives, as well as what contributed to or hindered the development and implementation of leadership. By understanding their perspective, I hoped to identify some aspects of established leadership theories that were more prevalent in leadership implementation. Also, I hoped that by revealing what occurred in practice, this study would offer valuable insight on leadership in contemporary organizations, leadership theories that emerged in practice, and revealed topics and issues to consider in the design and development of programs aiming to prepare leaders (RQ3). Hence, the initial research questions were:

RQ1. What aspects of established leadership theories, approaches, or models do people who pursue doctoral studies in Educational Leadership at Simon Fraser University identify in how they experience their own leadership?

RQ2. What aspects of established leadership theories, approaches, or models do people who pursue doctoral studies in Educational Leadership at Simon Fraser University identify in how they experience others' leadership (being led or observed)?

RQ3. What are some implications of how people who pursue doctoral studies in Educational Leadership at Simon Fraser University experience leadership for the design and development of leadership studies programs?

3.2.5. Justifying the Methodology

Embarking on this research journey has brought me moments of sunshine and gloomy days. Perhaps this is normal. For a long time, every phase of research seemed to take longer than I expected, and slow was not a pace I was comfortable with. All this happened until life—in an ironical way—taught me otherwise. In trying to understand the research process, it felt like not only did I try to fit all the "conceptual pieces" (topic, questions, theory, and methodology) in a premade box, but my own perspective of leadership, too. It seemed like I was travelling an unknown path without a vision. The concept of "doing research" seemed foreign. But it may have been just a wrong attitude. Learning to manage the process with an open mind and without trying to control the unknown proved useful in overcoming what I call "the ten crises of completing a doctorate": ideology, personal, dissertation, career, "in-betweens", health, scepticism, anticipation, discouragement, and the looming "now, what?". Along this journey, finding the suitable methodology for the study was another challenge. When time came to select one, I first attempted to defy the process by looking for a methodological approach that would not disturb my preferred way of thinking while ensuring that I produced quality research. In a way, I was probably trying to conceal that acknowledging my biases and addressing preconceived ideas did not come too easily. Or, perhaps I was trying to do qualitative research with a quantitative mindset, a realm that felt familiar. In any case, becoming aware of what was happening led me to another reading binge until I seemed to exhaust possible qualitative approaches, finding pros and cons for each methodology. To some degree, when I read about case study, it seemed that this approach completed the circle. But maybe by this time, I became accustomed with what qualitative research was. The journey did not end here and in the next section, I describe in more detail where the journey took me.

3.3. Methodological Approach

A qualitative research design is appropriate when posing open research questions to study a phenomenon with the intention of providing an in-depth description of its various manifestations (Bogdan & Biklen, 2003; Creswell, 2014, 2016; Elliott & Timulak, 2005; Hancock, Ockleford & Windridge, 2007; Mason, 2010; Patton, 2015). I chose to conduct a qualitative research study because leadership is a complex phenomenon and my interest was in exploring how the group of participants experienced it, either directly or indirectly (observed) in order to identify aspects of leadership theory found in practice and implications for leadership education. The following subsections present the progression of the study, including the rationale for the decisions I made along the way.

3.3.1. Initial Framing of the Study: To Be or Not to Be a Case

After reviewing in depth various qualitative methodologies, I initially chose a case study methodology to conduct this research. I found that based on their focus, case studies may explain a phenomenon (explanatory) or describe a phenomenon (descriptive), and they could be used as a smaller-scale research study (exploratory) before expanding it two a larger scale (Baxter & Jack, 2008). According to Merriam (1988), most case studies incorporate elements of description and either interpretation or evaluation. In addition, based on how cases are used in research and the number of cases included in a study, they may be classified as single or multiple—also known as collective case studies; intrinsic, when the case itself is of primary interest, or instrumental, when the case is secondary to inquiry and used to gain understanding of a phenomenon (Baxter & Jack, 2008; Stake, 1995). Initially, I framed the study as a multiple case study and planned to interview people who pursued doctoral studies in Educational Leadership at Simon Fraser University about how they experienced leadership. My interest was not in the institution, the program, or the individuals themselves, but in how leadership phenomenon was experienced. Thus, an instrumental case study seemed appropriate. At the time of methodology selection, I could not predict how many participants would respond to my invitation. Framing the study in this manner seemed suitable if the number of participants was small. Besides, Stake (2006) recommended keeping qualitative multiple case studies "embraceable" and suggested a

sample of up to fifteen cases, so that they can be known "experientially" in their complexity by a single researcher. I set the minimum number of participants at five to continue with the study. If the response was higher than that, my plan was to interview participants until I reached saturation. Eventually, this latter part of the plan affected how the study was to be framed. Not reaching saturation for all topics explored (e.g., leadership implementation) and interviewing all 22 participants who expressed interest resulted in a shift in focus of the research approach in investigating the phenomenon from depth (within and across a small number of participants), which is usually accomplished in case study, to breadth (within and across a larger number of participants).

The case study, as I understood it, helped me identify a "bounded system", provided me with an option to look at the leadership phenomenon from multiple angles, analyze it in its complexities, and construct a holistic picture of the phenomenon. It also allowed for a flexible use of analytical methods. With a level of understanding that would let me work through the data collection and preliminary analysis, I continued. At many points in the process, I was able to identify the case and reiterate its characteristics. When it seemed that the case itself or the methods used did not fully meet well-established criteria, I looked for justifiable ways it could, and I continued. Nevertheless, by the time I completed the analysis processes, I could not answer the "what is the case?" question easily, nor could I justify how it fully met the case study characteristics. In the later stages of this dissertation, my committee challenged me to provide a stronger rationale for selecting the case study methodology and revisit the methodological steps I took. Thus, I revisited my methodological choices, my notes, reflections and justification of my decisions in the process, and read again about qualitative approaches. At this stage, I found that the study did not fully meet the characteristics of a case study, as an established research methodology. But it did not fully fit within other established qualitative inquiry frameworks, either. In fact, in reading widely about qualitative inquiry frameworks other than case study—which I became familiar with by this time—I began looking for reasons why it did not fit rather than how it did. I sense that only in this process did I fully understand why I selected the case study approach initially, how it aligned with my worldview and interests, and how it helped me create a mental model for the study. But I also asked myself: what *did* happen?

Tracing back the steps I took in the data collection and analysis processes, this is how the process unfolded. Making progress in this research study consisted of a long chain of decisions about how to address the issues I encountered but did not have an answer for. It was an experiential process. Within the flexibility allowed by the interpretive case study approach, which I chose initially, I felt less trapped in using procedures that did not seem to meet the needs of the analysis processes I was engaging in. I assume that in reading widely about qualitative research, I grasped various strategies of *doing* and was concerned less with their philosophical underpinnings. In conducting this study, I found joy in innovating, crafting, and finding ways to "weave things", not only in my making sense of literature and constructing the conceptual framework, but in my methodological approach, too. In retrospect, I suspect that I looked at the interpretive case study as a "safe zone", where I could be creative in making analytical decisions. But being practical in what I did, I approached every step both intentionally and creatively and, in the process, I engaged in *methodological bricolage* (Yardley, 2008; Yee & Bremner, 2011).

3.3.2. Subsequent Framing of the Study

The purpose of the research study was to understand how people experienced leadership, in terms of how they perceived, developed, and implemented it, in order to identify aspects of leadership theory that appeared in practice, as well as implications for leadership education. Hence, my study was framed within the interpretivist paradigm. Although I remained within this paradigm, to respond to the research questions and be within the scope of the study, I found myself borrowing strategies for data analysis from different methodologies and using or adapting them as needed. Elliott and Timulak (2005) encouraged researchers to adopt a "more pluralist approach to research" (p. 157) and "develop their own individual mix of methods that lend themselves to the topic under investigation and the researchers' preferences and style of collecting and analysing qualitative data" (p. 148). Moreover, Schnelker (2006) argued that graduate students engaging in research needed to be provided with opportunities "to develop an appreciation of the distinctions between research paradigms and to develop their own ideas about what it means to engage in research" (p. 46). As a "researcher-in-training" and someone who had learned and developed competencies within the quantitative

realm, I wanted to learn what conducting qualitative research entailed and I found value in this eclectic analytical approach.

There are several examples of methodological approaches that incorporate methods drawn from multiple established qualitative inquiries. For example, Thorne, Kirkham, and MacDonald-Emes (1997) borrowed from ethnography, grounded theory, and phenomenology to develop the interpretive description, a qualitative research approach that was meant to address the specific needs of nursing research. In the field of design, Yee and Bremner (2011) claimed that methodological bricolage, which was defined as a combination of analytical methods, was a prevalent approach in doctoral research studies in the field of design. As well, Yardley (2008) introduced the idea of "mappable space" research, which, by integrating a wider range of techniques and tools in an "emergent construction", allowed researchers "to explore even the most inaccessible and unpopular regions of their chosen research domain" (n. p.). Moreover, the data analysis "craft and art" was described as eclectic, consisting of "explicit, systematic, and […] creative methods" (Miles, Huberman, and Saldaña, 2020, p. 4). Patton (2015) argued that

> Being practical and flexible allows one to eschew methodological orthodoxy in favor of *methodological appropriateness* as the primary criterion for judging methodological quality, recognizing that different methods are appropriate for different situations. Situational responsiveness means designing a study that is appropriate for a specific inquiry situation or interest. (p. 92, original emphasis)

In this study, I was practical in selecting the methods for data analysis. I found that adhering strictly to one established qualitative inquiry framework in following the data analysis methods did not allow me to reach the purpose of the study. For me, "[d]rawing on creativity and pragmatism open[ed] up new possibilities, the *bricolage* of combining old things in new ways, including […] combining inquiry traditions" (Patton, 2015, p. 154, original emphasis). To some extent, in data analysis, I borrowed or adapted methods and concepts from inquiry traditions that are consistent with grounded theory—an inductive process of data analysis in building substantive theory and constant comparison methods, phenomenology and heuristic inquiry—meaning-making of experience, case study—the notion of bounded, integrated system, constructivism/constructionism—construction of knowledge, and hermeneutics— interpretation and context (Merriam & Associates, 2002; Patton, 2015). But I also

engaged in "thinking with theory" (Douglas, 2017), used deductive data analysis by having several a priori themes consistent with the components of the conceptual framework, and did not bracket but rather acknowledged my assumptions (Patton, 2015). By asking "what do I wish to accomplish?" at every stage of the process and choosing to see practices as "supportive resources" to reach the goals of the study, I engaged in what Gergen (2014) calls "reflective pragmatism" (p. 58). This approach became more apparent as I was searching for suitable methods to analyze the dataset, which turned out to be more complex and richer with each completed interview.

3.4. Participants

This section presents the rationale behind participant selection. For this study, I intended to recruit alumni and people who withdrew from the Educational Doctorate in Leadership Programs at Simon Fraser University for the following reasons. First, in undertaking graduate studies in leadership, they self-identified as people interested in engaging in the scholarship of leadership and in broadening their understanding of leadership, in general, or as it pertains to education. Second, being admitted in the program, they were deemed qualified to undertake this type of study and scholarship. Third, during their studies, they had the opportunity to acquire foundational knowledge of leadership theories, which would promote awareness and deep understanding of the concept, and in turn, inform their discourse. This would aid with the type and quality of data collected for the study and the analysis and interpretation processes. Fourth, participants might have considered their studies as an opportunity for their own leadership development and familiarization with leadership theories, which could inform better practice. Fifth, their demonstrated interest in leadership might suggest that they were more likely to hold leadership roles or aim for future senior leadership roles. These aspirations could increase their interest in leadership understanding and development and could make them more open to contributing to the knowledge in the field by participating in this study. Finally, as prospective participants were not active students at Simon Fraser University, recruiting from this population ensured that there were no conflicts of interest—such as financial, academic, or other personal gains—that might compromise the research. There was also no coercion or perceived negative consequences of participating in the study. However, due to unforeseen logistic challenges encountered in the recruitment phase, I was not able to

recruit people who withdrew from the program. Reflecting on what data I expected to collect for this study, I determined that excluding this group did not pose a concern with regards to the value or the design of the study. On the contrary, alumni were more likely to hold leadership roles, which would enable them to speak about both their experiences with leadership and how they understood and applied theory in practice. As such, I continued with the study and recruited from the alumni group only.

In selecting to recruit from this population, I also considered the downsides of "studying [my] own backyard" Creswell (2016, p. 19). As I have undertaken an Educational Doctorate in Leadership (EdDL), too, tensions and ethical issues could arise at any stage in the study—recruitment, data collection, data analysis and interpretation, reporting, and dissemination. Also, various stakeholders could misunderstand the reasons for my conducting this study or perceive it as a program evaluation. Finally, if I did not carefully and continuously acknowledge my own assumptions, I might have ended up looking for information that confirmed a story of leadership that I already knew. Nevertheless, despite these concerns, I decided to move forward with this research and address any challenges if they occurred. On one hand, I considered my being part of the EdDL program and knowing some of my peers an advantage. I thought that having already built rapport with some potential participants would increase the likelihood of their participation in the study and possibly help them be more comfortable and open in sharing their experiences in an interview. On the other hand, this was not an evaluative study of the program. The rationale for deciding to recruit from this population and the purpose of the study were clearly and appropriately described in this chapter and in the ongoing communication with participants. Lastly, I believed there was sufficient diversity of roles, institutions, and perspectives among participants to warrant the writing of a story that was not predetermined. My conceptions of leadership were also clearly acknowledged throughout the study.

3.5. Recruitment Methods

To identify potential participants for this study, I intended to use a combined method of recruitment. In the first step, I would send an initial email invitation to a maillist maintained by the Faculty of Education, Graduate Programs, so that the study was promoted to the entire Educational Doctorate in Leadership (EdDL) group. I also thought that by using this method, I could access people who withdrew from the program and still

subscribed to the maillist. The second step involved an online search for contact information of EdDL alumni on public networks (e.g., LinkedIn, personal and/or institutional websites) using the names available on the university website, on the Upcoming and Past Thesis Exams pages. However, the use of the maillist was not feasible as it turned out that it did not include the population I intended to recruit from. While alternatives were suggested and discussed, they involved substantial delays in continuing with the study. I decided to pursue them only if the second recruitment method would not prove successful in recruiting at least five participants.

Therefore, I moved to the second recruitment method and at first, consulting the SFU website, I identified that there were over 100 EdDL defenses between 2007-2018. I cross-checked the names found on the website with a public list of 120 EdDL alumni (109 from English programs and 11 from French programs). These potential participants belonged to 16 EdDL cohorts (14 English and 2 French). Then, starting with the names of the 109 EdDL (English) alumni, I searched on LinkedIn—an online professional network—to see if there were any profiles under those names. The idea was to search for the alumni from the EdDL (French) cohorts only if I encountered difficulties in recruiting at least five participants from the EdDL (English) alumni. The reason I used this network for my searches was that LinkedIn profiles have an Education section and I could identify people who completed an EdDL at Simon Fraser University. Using only Google searches, for example, would have not guaranteed that I was contacting the right people. Hence, I combined the recruitments methods to maximize the number of potential participants.

In this first phase, using LinkedIn, at the time of my search, I found profiles for a total of 69 names from the initial EdDL English list. There were 45 names that had single profiles and 24 that had multiple profiles. I looked closely at each of the 24 names that had multiple profiles and excluded 11 names based on the Education section, which either showed that people did not complete an EdD in Leadership at Simon Fraser University or the section itself was not viewable, most likely because of privacy settings. Thus, using these recruitment methods, I was able identify 58 names with LinkedIn profiles that I could potentially contact. In the next phase, I accessed the "See Contact Info" page for the 58 LinkedIn profiles and found 31 email addresses, which I used to send prospective participants the initial invitation by email. I then sent a preliminary message via LinkedIn to the remaining 27 people, for whom I did not have an email

address, and offered the option to contact me for more details if they were interested in participating in a research study.

In my attempt to offset the effect of not using the maillist and still identify as many alumni as possible to invite to participate in this study, in the second phase of recruitment, I used Google to search for the remaining 40 names on the initial EdDL (English) alumni, for whom I did not find an email or LinkedIn profile using the recruitment methods described above. In doing so, I aimed to identify any contact information available online, outside LinkedIn. When I found contact information, I also checked that the individual completed an Educational Doctorate in Leadership at Simon Fraser University. Using this method, I was able to identify email addresses for 11 additional potential participants.

In total, I sent the initial invitation (Appendix A) to 69 EdDL alumni (58 in the first phase and 11 in the second phase) either by email or LinkedIn messaging. I received one error message stating that the email address was no longer active. This initial invitation mentioned a possible follow up after two weeks. I left this possibility open in case less than five people responded. Within 24 hours, 16 potential participants expressed interest in finding more details and/or participating in the study. Within the two-week suggested timeframe for response to my initial invitation, another 9 potential participants responded, leading to a total of 25 potential participants who contacted me for more details. One of them declined to participate and did not receive further details about the study. Two additional people contacted me after the two-week deadline and asked for more information about the study. Hence, I provided details about the study and what participation involved by email (Appendix B) to a total of 26 potential participants. Upon following up with the 26 potential participants to confirm participation and schedule interviews, two more potential participants declined and two did not respond to my follow up.

Employing the combined methods described in this section, I was able to recruit 22 participants from 10 EdDL (English) cohorts to schedule an interview with. As mentioned earlier, I set a minimum number of five participants for the study to commence. The number of participants exceeded the minimum set number. Hence, I did not need to follow up with people who did not respond to my invitations or recruit from the EdDL (French) alumni group. I kept a record of all the recruitment activities on a

password-protected Excel file on my laptop for the duration of the recruitment phase. The file was transferred to a secure drive afterwards and will be kept along with all files associated with this study for five years, per SFU Office for Research Ethics requirements.

3.6. Data Collection

In qualitative studies, data required to answer the research questions need to provide enough depth and detail to facilitate the understanding and description of the complexities of the phenomenon under study (Patton, 2015). Data need to be both rich (quality) and thick (quantity), the former described as being "many-layered, intricate, detailed, nuanced, and more" (Fusch & Ness, 2015, p. 1409). Qualitative studies on leadership had generally employed one or more data collection methods, such as interviews (Barrett, 2006; Bedard & Mombourquette, 2015; Bolden et al., 2008; Bouchamma & Brie, 2014; Bryman & Lilley, 2009; Catalfamo, 2010; Cardno, 2013; Creanor, 2014; Gibbs et al., 2008; Martin, Trigwell, Prosser, & Ramsden, 2003; Owen & Demb, 2004; Perry, 2014; Ruhland & Silvestre, 2014; Skorobohacz et al., 2016; Smith, 2005; Söderhjelm, Björklund, Sandahl, & Bolander-Laksov 2018; Uusiautti, 2013); document review/analysis (Barrett, 2006; Cardno, 2013; Gibbs et al., 2008; Perry, 2014; Ruhland & Silvestre, 2014); open-ended surveys/questionnaires (Bak, 2013; Catalfamo, 2010; Riley & Russell, 2013; Robertson & Webber, 2000; Söderhjelm et al., 2018); observations and field notes (Gibbs et al., 2008; Perry, 2014; Robertson & Webber, 2000; Söderhjelm, et al., 2018); narratives (Skorobohacz et al., 2016); and reflective journals (Robertson & Webber, 2000). This qualitative study aimed to create a multifaceted picture of how the central phenomenon of leadership is understood and experienced by and across participants. Thus, I felt that the interview method was an appropriate method for gathering participant understanding of how they experienced leadership. For triangulation purposes, aside from triangulating data within and across the interviews, some of my systematic reflections were also included in the dataset.

3.6.1. Methods

In-depth Interviews

As one on the primary methods for data collection in qualitative studies, interviews allow the researcher to access unique participant experiences and reveal multiple views of the studied phenomenon (Creswell, 2016; Jacob & Furgerson, 2012; Merriam, 2002; Patton, 2015). This study employed a qualitative in-depth interviewing method. This is a form of conversational interview that did not rely on a predetermined set of questions. Instead, it used an Interview Guide (Appendix C) consisting of a series of predetermined topics or issue-oriented questions that provided flexibility in conversation while giving some structure to the interviews and allowing for gathering detailed descriptions of events from the interviewee's viewpoint (Patton, 2015; Elliott & Timulak, 2005; Hancock et al., 2007).

The interview method usually warrants a deep investigation of how participants view a phenomenon and grants the interviewer control over the line of questioning, which in turn favours the type, richness, and extent of the data collected. However, the interviewee has control over what information is being disclosed and the interviewer's presence may induce biased responses (Creswell, 2014; Elliott & Timulak, 2005). Therefore, it is essential that the researcher carefully probe what is being disclosed and make sure that what is said is accurate and meant to be conveyed that way. Also, my engaging in reflective processes helped sway me away from agreement or disagreement with what participants shared and instead, develop "evocative empathy" (Martin, 2011), which, in turn, minimized my biases overshadowing participants' ideas and helped me respond to the stories they shared accordingly. Establishing good rapport with participants usually increases the likelihood of their being comfortable with sharing experiences in their interview (Creswell, 2014; Jacob & Furgerson, 2012; Miles, Huberman, & Saldaña, 2020). I had a good rapport with several participants prior to engaging in this study and I began building good rapport with the others in the recruitment process and during the interview. Nevertheless, I considered that some participants might still be concerned about how what was disclosed might affect them, the actors in their stories, their institution, or the perception of them and people or institutions they talked about. To alleviate these concerns, I used the following methods: assured participants of the confidentiality of interviews and prepared a Consent Form

(Appendix D) explaining the purpose of the study and how the information disclosed was to be reported and used; gave them the option to withdraw from the study at any time, including after the data collection and analysis were complete; asked them to review their own interview transcript and my initial interpretation of our conversation in the form of a one-page Interview Highlights; and invited feedback on preliminary findings. Moreover, in writing the results, I did not include comprehensive stories from interviews. Participants were open and shared complex stories with me, which would most likely pose confidentiality concerns if included intact. I considered it better to err on the side of confidentiality. Therefore, I presented the analysis of such stories and used quotes to illustrate the ideas that emerged during the analysis. I also used a pseudonym and I ensured that quotes were carefully selected and where needed, details that might identify participants, other people or institutions were removed. Although some quotes initially selected would have provided more evidence or depth to findings, in a few cases, in order to maintain confidentiality, I chose to describe the concept or issue emerging from the example or situation rather than use an actual quote. When unsure, I followed up with the participants.

Systematic Reflections

Reflection on research processes are common in qualitative research and they take the form of fieldnotes, which are defined as "the written account of what the researcher hears, sees, experiences, and thinks in the course of collecting and reflecting on data in a qualitative study" (Bogdan & Biklen, 2003, p. 111). Depending on their content, fieldnotes may be descriptive—containing details about what occurs in the field, or reflective—containing a record of methods, procedures, "think pieces", questions, or dilemmas (Bogdan & Biklen, 2003; Elliott & Timulak, 2005). While conducting the data collection and analysis for this study, I engaged in reflection during and after the interviews (Interview Notes, Interview Highlights, Post-Interview Reflections), as well as in the data analysis and interpretation (Data Analysis Reflections). These writings became part of a set of my systematic reflections, which was meant to supplement the data collected via participants interviews. They provided descriptions of my observation in the interviews, keywords, summaries, or emerging ideas to be revisited in the analysis processes. Also, these reflections were meant to provide a log of the procedures employed, changes in direction, clarification of ideas or questions I had, emerging themes or patterns, visual representations, and how my engagement in this research

affected me personally. I logged the reflections chronologically and used multiple strategies to record them (handwriting, recording and transcribing, or typing). Some of the reflections written during this study were used for triangulation purposes in the interpretative stages (Appendix E).

3.6.2. Interview Protocol Development

In order to answer the research questions, I needed to collect data about participants' experiences with leadership and for this, I used in-depth interviewing. Developing the interview protocol was lengthy and involved piloting, revisions, and re-envisioning the process. As established in reviewing the literature and constructing the framework for this study, there were two main leadership aspects that seemed to emerge in practice: development and implementation. Thus, I planned to ask interview questions related to these topics in interviews. However, to contextualize participants' leadership experiences, I saw the need to understand how participants conceptualized leadership, as well. In the preliminary stages of developing the data collection protocol, there was tension between collecting data to support a theory-based or an emergent analysis, or both. Being new to qualitative research and trying to understand how to conduct a qualitative study, I felt I did not quite grasp the two approaches well enough, in terms of what they involved and how the study would be framed differently depending on the approach. Hence, I embarked on a journey of discovery and informed decision-making—pilot testing—before solidifying the data collection procedures.

Pilot Testing

Prior to commencing a large-scale qualitative study, collection instruments need to be pilot tested (Patton, 2015; Stake, 1995). For this study, I conducted a three-phase pilot test with a total of nine people from my network. These pilot interviews were not included in the dataset, but they helped me in three aspects of the study: (1) explore criteria for participant selection and rationalize the selection process; (2) refine my interviewing techniques and test the interview protocol to ensure that data collected were in line with the purpose of the study and relevant to the research questions; and (3) hone my qualitative research skills by engaging in a preliminary data analysis and interpretation exercise.

The pilot unfolded in three phases and after each phase, I reflected on the process, my learning, and how it could inform my study methods. In the first phase, I used an unstructured interview method to informally interview five people from my network. Although this phase provided me with a wide understanding of the leadership phenomenon and how it unfolded in various contexts—professional, educational, and personal—I found that the dataset was fairly broad and unstructured. Therefore, I needed a narrower focus for the study, some structure to the interview conversations, and more rigorous criteria for participant selection. In this pilot testing phase, I had the opportunity to refine my interview note-taking skills as I did not record the interviews.

Before engaging in the second phase, I developed an Interview Guide, which covered three main topics: Overall Perspective of Leadership, Leadership Development, and Leadership Implementation. Adding some structure to the interview helped cluster the stories of leadership and keep the conversation focused while still providing room to explore deeper the issues that participants' stories brought to light. I presented the two interviewees who took part in this phase with the Interview Guide beforehand and after the interviews, I debriefed with them on the methods and topics used (Appendix F). They offered feedback on the interview questions and shared that having the guide before the interview helped them reflect on their past experiences and select experiences that they thought would provide good insights about the phenomenon or stories that were meaningful to them.

The third phase of the pilot testing involved going through all methodological steps outlined for this research study—recruitment (individual invitation, follow up with study details and consent form), interview, transcription, and preliminary data analysis and interpretations processes. In this phase, I interviewed two people and also provided them with the Interview Guide beforehand. After going through the preliminary data analysis for each interview, I invited the two participants to give me feedback on their Interview Highlights and additional details about topics that were not clear in the interview.

Pilot testing helped me trial the proposed methods, foresee and troubleshoot some of the issues that I might encounter in the data collection and analysis, including the use of new technological tools, and examine the feasibility of the research design before employing this approach on a larger scale. Engaging in this three-phase pilot

testing helped me refine the data collection and preliminary data analysis methods and each phase showcased how these methods evolved. By the time the pilot testing was completed, I decided to use the Interview Guide (Appendix C) I developed and send it to participants before the interview. By reflecting on and comparing the type of data collected in the three phases of the pilot test, I determined that the participant selection criteria described earlier in the chapter allowed for a rich dataset and provided the basis for findings in line with the research questions and the purpose of this study.

Interview Guide

To collect data for this study, I developed an Interview Guide consisting of ten interview questions (Q1 – Q10) grouped in five sections: Participant Profile (A), the three main interview topics— Overall Perspective of Leadership (B), Leadership Development (C), Leadership Implementation (D), and Closing (E). Participant stories pertaining to the Overall Perspective of Leadership and the two Leadership Dimensions (Development and Implementation) were used to establish to what extent the three Leadership Domains (Individual, Interactional, and Collective) were found in practice. The ten interview questions may be found in Table 1 and are described next.

Participant Profile (A) allowed for demographic data to be collected, in terms of specific position and length in the current institution (Q1). In conducting the pilot interviews, I pondered about asking people for a brief description of their career journey. Would this provide more insights on how and possibly why participants arrived at the current stage in their career? Or, would this take me outside the scope of the study?

In debriefing with one interviewee after the pilot interview, it became obvious that asking something along the lines of "what brought you here?" or "tell me a bit about your career journey so far" would add value to the conversation and the dataset. I decided to use it in the first couple of participant interviews and reassess later. When I conducted the preliminary data analysis for those interviews, I noticed that the addition helped as it provided insight into participants' leadership that may have not come up during the interviews otherwise. Hence, I asked the appended first question in all interviews.

Table 1.   Interview Questions

Interview Section	Interview Question
A. Participant Profile	1. To begin with, tell me about your current institution, your role, and how long you've been in your current role at this institution.
	2. What do you think informs your perspective of leadership? In what ways?
B. Overall Perspective of Leadership	3. Tell me some stories about experiences you've had with leadership that, from your perspective, best define what leadership is or isn't. These stories can be about your own leadership or what you may have observed in others' leadership.
C. Leadership Development	4. Think about memorable times and surprising lessons of leadership. Tell me some stories that are meaningful to you about how you've developed your leadership. These stories can be about your own leadership or what you may have observed in others' leadership.
	5. How are you planning to continue your leadership development?
D. Leadership Implementation	6. Tell me some stories about times when you've experienced success or struggle with leadership and how these experiences influenced your leadership. These stories can be about your own leadership or what you may have observed in others' leadership.
E. Closing	7. Is there anything else that you'd like to add?
	8. If I need additional information or clarification on anything you shared with me today, could I contact you for a follow up interview?
	9. Once the transcript of this interview and the initial analysis are finalized, I'd like to ask you to verify them for accuracy and provide me with feedback. Would you be willing to do so?
	10. What pseudonym would you like me to use to identify you in my study?

The second interview question (Q2) aimed to help me contextualize the interview in terms of what informed participant's perspective of leadership and what type of experiences they may share in the interview. During the preliminary data analysis, it appeared that this question was more appropriately combined with the third question (Q3) in order to grasp what informed participants' leadership and how they defined leadership. Thus, although the Interview Guide remained unchanged, in data analysis, I combined the two interview questions (Q2, Q3) to form the underpinning of participants' Overall Perspective of Leadership (B).

The fourth (Q4) and fifth (Q5) interview questions provided an opportunity for participants to share meaningful stories about memorable times or surprising lessons drawn from their experiences, as well as further endeavours to develop their leadership. Data collected with these two interview questions were to be used to explore various aspects of Leadership Development (C). The sixth interview question (Q6) was intended to direct the conversation toward Leadership Implementation (D), particularly how success or struggle influenced participants' leadership.

The Closing (E) interview questions first provided an opportunity for participants to add to what they had shared with me (Q7), leaving it up to them to direct the conversation to either of the explored topics. Then, the remaining questions (Q8 – Q10) were used to ask for permission to contact them for a follow up interview, if needed, and transcript and initial findings review, as well as select a pseudonym to be used in reporting the findings of the study.

Aside from including questions grounded in the literature, the Interview Guide contained a short script at the beginning to prompt me to add the interview number, time, and location, and the receipt of the signed consent form; it incorporated broad open-ended questions arranged in a logical order and in a way to help build rapport with participants; and it allowed me to use prompts to explore issues and topics that participants would bring into discussion (Jacob & Furgerson, 2012).

3.6.3. Data Collection Procedures

For this study, I conducted 22 interviews (not including the pilot interviews), averaging 49 minutes and ranging between 31 and 86 minutes. Fourteen interviews were conducted face-to-face, seven online, and one by phone. All interviews were audio recorded. I did not notice a difference in building rapport with participants in the face-to-face or online interviews. However, it took longer to build rapport with the phone interview participant.

When participants consented to participate in the study, they agreed to a meeting for an interview scheduled at a time and location mutually agreed upon. Beyond that, at my request yet with no obligation, they could further engage in the study by reviewing their own interview transcript and highlights, participating in follow up interview(s) if additional details were needed, or providing feedback on early findings. At the beginning of the meeting, as part of building rapport with participants, I briefed them on the study details, answered any preliminary questions, and obtained or confirmed the receipt of their signed Consent Form (Appendix D). To increase data quality and avoid poor interviews or multiple follow ups, I provided participants with the Interview Guide beforehand, so they had an opportunity to reflect on leadership experiences they could share in interviews. To ensure that I collected an appropriate quality and quantity of data, my goal was to be thorough in my interviews by posing the primary interview

questions, probing and asking clarifying questions when required for explanation or elaboration of issues brought up. Although the main topics covered in interviews remained the same, clarifying and probing questions were unique to each participant depending on what they shared (Elliott & Timulak, 2005; Gergen, 2014; Jacob & Furgerson, 2012). I took detailed notes during interviews to have a backup in case the audio recording quality was poor. As well, in the Interview Notes (N_1–N_{22}), I wrote down keywords or phrases to use for coding, or concepts I might ask participants to elaborate on when the opportunity arose, without interrupting the flow of their answers. More details about the procedures I used may be found later in this chapter. As I engaged in this preliminary data analysis, I followed up with four participants by email to clarify interview details or themes that seemed to emerge from their interview. The outcome of the preliminary data analysis was the Interview Highlights (IH_1—IH_{22}), which contained the main ideas from the interview.

The heart of the interviews was participant stories about how they experienced leadership. These stories were about how participants defined leadership, what informed their perspective of leadership, what or whom influenced their leadership development, and their experiences and observations with how others developed and implemented their leadership. These examples were about times when they or others succeeded or struggled with leadership. Successes showcased what worked whereas struggles showcased what did not. Looking for both aspects helped create a comprehensive picture of the leadership phenomenon as it unfolded in practice and revealed possible gaps in knowledge that were useful in drawing the implications for practice and leadership development programs.

In conducting the interviews, I encouraged participants to start conversing about each of the interview topics from a point they were comfortable with and stories they were most willing to share. Although the course of the conversation differed among respondents, using the interview guide ensured that the outlined topics were covered in all interviews. Depending on what participants shared, I built on our conversation by asking clarifying or probing questions. Interview flow slightly differed among participants. Some launched into the interview by sharing complex stories of leadership that encompassed more than one of the explored topics. Others preferred that I asked the questions sequentially or had prepared stories from their practice corresponding to the interview topics. In any case, my role was to ensure that all questions were asked in the

interview even though they did not always follow the pre-set order. As participants owned their stories and controlled what they shared, it was up to me as the researcher to ask the right probing questions so that I collected enough quality data to answer the research questions (Hancock et al., 2007; Jacob & Furgerson, 2012; Mason, 2010).

Some parts of the interviews focused on certain predetermined constructs of leadership (e.g., leadership styles, skills, or activities) and at times, participants directly discussed specific leadership theories or concepts from their leadership practice. Nevertheless, my main goal was to collect participant stories and then, in analyzing them, to look at how they described leadership constructs, actions or events, as well as identify their expressed (overt) perceptions of leadership, or perceptions demonstrated through their described constructs, actions, or events (covert). Hence, in conducting the interviews, rather than simply asking participants to discuss their understanding of leadership theory, I focused our discussion on leadership stories, which I then analyzed to pull meaning from and identify how participant experiences connected to leadership theory. An important component of this study was establishing the context within which each participant developed their understanding of leadership, as well as what and whom informed their perspective, development, and implementation of leadership.

Upon each interview completion, I listened to the audio recording (I_1—I_{22}) to check for quality of sound and following my interview notes, I added details that seemed important or ideas that I could include in my post-interview reflection. At that time, I sent participants a thank you note, also confirming the quality of the recording and next steps in the process. The quality of recordings was very good for the in-person interviews and generally good for the remote interviews. When in doubt or unclear about what was said, I asked participants to confirm the content when they reviewed their interview transcript. Interviews were transcribed verbatim and most of them were transcribed within two weeks. Upon completion, I listened to the recording again following the transcript to check for accuracy before sending it to participants for review. I sent the Original Interview Transcript (O_1—O_{22}) along with the Interview Highlights (IH_1—IH_{22}) to participants and gave them two weeks to respond to either confirm the accuracy or make the necessary changes in the two documents.

Throughout the data collection phase, aside from the interview notes, shortly after each interview, I wrote a Post-interview Reflection (M_1—M_{22}) with key ideas,

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interview observations, and my initial interpretations or reactions to what participants shared with me (Bogdan & Biklen, 2003; Creswell, 2016). I also wrote several separate reflections (E$_i$) when new insights or questions emerged from the coding, analysis, and interpretation processes (Appendix E). Engaging in reflection was also useful to uncover any biases and preconceptions I may have entered the research with (Bogdan & Biklen, 2003; Schnelker, 2006). These biases and preconceptions could have prevented me from exploring further when I seemed to have found what subconsciously I may have been looking for. Acknowledging them helped me reflect on the development of my own understanding of how I related to the phenomenon, participants, and data. The reflections were also helpful to uncover my experiences and observations with leadership that either confirmed or disconfirmed what participants shared with me; audit the type and quality of data I collected; and note any emerging themes or concepts that I had not considered previously.

In the beginning of data collection and analysis, I thought that the most difficult issues to reflect on might be related to perspectives that were quite different than mine. Advancing in the study, I found the contrary. The most laborious part of the reflective process was to acknowledge and reflect on how I reacted to experiences that were similar to mine—positive or negative—that evoked strong feelings. I had to be mindful of and contain my enthusiasm, joy, or approval when participants seemed to have experienced success in similar ways, as well as frustration, discontent, or occasional aggravation to struggles and negative experiences. Reflection, along with my dialogue with participants, helped me address my biggest concern in conducting this study: writing an(other) piece of either "angry research" or "oblivious research", which would not reflect the realities of leadership as emerged from participants' stories. I continued recording my systematic reflections throughout the data analysis, writing, and revision phases. They were hand-written, recorded, or typed. For example, one excerpt from a reflection from writing of the findings phase:

> Can I go write about leadership after experiencing *this* [personal leadership experience]? What would I write and how would my writing look? I just don't want to end up writing the "angry" research I used to read... But I'm glad I went through this experience. Because… not only did I read about it or heard about it, I also experienced it. I'm not unaware anymore of how [this] feels, how such an experience unfolds… and the struggle to move on. But I can't write now, either… I need to take time to process what I've just experienced... I have to understand what just happened […]

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This reflective process helped me go beyond a story of leadership that (I thought) I knew and look for unique features and unexpected insights. These reflections were integrated in the data analysis and interpretation directly (reflections related to the topics explored, key ideas, interview observations, and data analysis procedures) or indirectly (reflections that helped me make sense of how I engaged in my research, my perspective on the topic, my reactions to what participants' shared, as well as how these reactions may affect my interpretations). Several other reflections were integrated when positioning myself as the researcher or in other sections of the discussion and conclusions chapters. More excerpts from my systematic reflections are included in Appendix E.

3.7. Data Analysis

In qualitative studies, there is no definite point where data analysis begins, but it usually happens during the data collection phase and is completed when the entire project is finished (Baxter & Jack, 2008; Creswell, 2014, 2016; Maxwell, 2013; Merriam & Associates, 2002; Patton, 2015; Hancock et al., 2007). Data analysis processes generally include developing ideas, deconstructing data in manageable chunks, coding and aggregating concepts, and creating or adapting visuals that help develop an understanding of the data and/or could be used in the later stages of data analysis (Saldaña, 2013). As qualitative data analysis processes are emergent rather than linear, they require back-and-forth between research questions, methods, and relationships between the themes (Creswell, 2014; Patton, 2015), which was the case of this study, too. Flexibility in analytic processes is one of the primary characteristics of qualitative studies because codes, categories, and themes emerge from data throughout the process. Thus, it is essential to allow for non-anticipated and unusual codes or themes to be considered too (Elliott & Timulak, 2005; Kohlbacher, 2006; Maxwell, 2013; Owen & Demb, 2004; Ryan & Bernard, 2003; Saldaña, 2013). As Gergen (2014) claimed, qualitative researchers engaged in a "dynamic process of interpretation, one that remains open, flexible, and emphatic" (p. 51) rather than a prescribed process. Qualitative data may be analyzed inductively—"bottom up", where raw data is used to generate codes, categories, and themes, or deductively—"top down", where data is collected and analyzed to verify a theory (Creswell, 2016; Kohlbacher, 2006). Some data analysis methods used in qualitative research on leadership were: phenomenographic analysis (Martin et al., 2003); comparative case analysis (Smith, 2005);

phenomenological analysis (Madsen, 2007); deductive analysis (Uusiautti, 2013); cross-case analysis (Bedard & Mombourquette, 2015; Perry, 2014); inductive analysis (Ruhland & Silvestre, 2014); grounded theory analysis (Robertson & Webber, 2000); and content analysis (Söderhjelm et al., 2018).

For this study, I first conducted a preliminary data analysis, then I analyzed the 22 interviews individually. Next, I looked for similarities, differences, and unique features across the interviews while also incorporating my systematic reflections. Finally, I went back to the conceptual framework to identify how leadership domains and dimensions seemed to be present in or diverge from the dataset. The steps taken to prepare the interviews for analysis are illustrated in Figure 3 and detailed in the next subsections.

3.7.1. Preliminary Data Analysis

When listening to the interviews shortly after completion, I checked the recording quality(I_1—I_{22}), added details to my Interview Notes(N_1—N_{22}), looked for any topics or issues that I needed to follow up on, and tried to form a general idea of how each interview may fit within the dataset and/or previous preliminary analysis. In this process, I considered what clarifying questions I could ask in subsequent interviews to interrogate further prospective themes emerging from completed interviews. For each interview, I also recorded a Post-interview Reflection (M_1—M_{22}) the same day the interview was conducted, which was subsequently transcribed using a voice-recognition software.

In the preliminary data analysis, I wrote a one-page Interview Highlights (IH_1-IH_{22}) for each interview, based primarily on my interview notes. Interview Highlights were structured to include Participant Profile, Overall Perspective of Leadership, Leadership Development, Leadership Implementation, and Other Comments. Writing these highlights had a dual purpose: it provided participants with my overall understanding of what they shared in the interview and initial thoughts or selected phrases that I might use in the analysis and writing the report; and it provided me with an overview of the interview and possible keywords, phrases, or short quotes that I could use in generating codes or themes.

Figure 3. Preparing the Dataset for Analysis

Data Collection

Audio Interviews (I_1–I_{22})
Interview Notes (N_1–N_{22})
Post-interview Reflections ($M_{1–22}$)

Transcription

Revised RQs

Preliminary Data Analysis

Original Interview Transcripts (O_1–O_{22})

Original Interview Highlights (IH_1–IH_{22})

Member-Checking   **Transcript Verification**

Verified Interview Transcripts (O_1–O_{22})
Verified Interview Highlights (IH_1–IH_{22})

Pre-analysis Preparation

Confidential Interview Transcripts (C_1–C_{22})
Confidential Interview Highlights (H_1–H_{22})
Post-interview Reflections (M_1–M_{22})
Data Analysis Reflections (E_i)

I sent this document to each participant along with their original interview transcript and asked them to review and send me feedback, new insights, or changes to either document within two weeks. Sending these documents within several days after the interview ensured that conversations were still fresh for participants and if any new insights or ideas emerged in the meantime, they would share them with me before I engaged in further data analysis. Twelve participants responded, confirming that transcripts were accurate, and Interview Highlights reflected what was said in their interview. In two cases, I exchanged several additional emails with participants for further clarification on issues brought up in the interview, which helped me understand better what they meant. In one case, the exchange was based on a philosophical disagreement between the participant and I, which could have resulted in misinterpretation of the interview data if not resolved at that time. Three participants added details or stylistically changed parts of their transcripts and when changes were made to either the transcript or highlights, I used the updated version for further data analysis. Through these conversations with participants, I was able to better understand what they meant and accurately represent that in the data analysis and interpretation.

3.7.2. Revised Research Questions

When engaging in data collection and preliminary analysis, I noticed that the distinction between how participants experienced their own enactment of leadership and what they observed in others was not as apparent as I had thought. Participants' experiences with or observations of others' leadership became largely a part of their own learning and practice of leadership. Based on this observation, merging the first two research questions seemed appropriate. In the data analysis processes, I also became aware that even though participants named specific leadership theories or approaches in their interviews, the aspects of the theory forming the basis for answering the research questions would be identified primarily by me—as the researcher—in the process of sifting through participants' stories with the understanding developed in the literature review processes and within the conceptual framework that guided the study. Moreover, in the later stages of the study, reflecting on how the study design and methodology evolved, engaging in discussion with my supervisory committee, and being challenged to think once again outside the artificially-created box that became my new comfort zone, a question surfaced: what is the purpose of the conceptual framework? The sense was

that its purpose went beyond my attempt to organize the literature review. When I was asked to add clarity to the development process of the framework, I was able to uncover new nuances about why I constructed the framework in the first place. Also, building a tri-dimensional puzzle of a wooden sphere—while on a break from writing—helped me visualize the missing pieces and articulate the leadership domains as the building blocks of the puzzle and the leadership dimensions as the facets of those building blocks. In this process, I was also able to understand better what may have been an intuitive venture before: how I used the conceptual framework throughout the study. By gaining clarity through these Aha! moments, in my envisioning the research study as building the conceptual framework puzzle, the first research questions became more focused.

In addition, in the preliminary analysis, I noticed that participants shared stories related to various forms of leadership education, not only their doctoral degree. As the interviews did not include specific questions about the doctoral program, I considered drawing from these stories insights that could be useful for leadership education, in general. These implications could form the basis of future studies focusing on specific forms of leadership education (formal, informal, or non-formal). Therefore, the research questions were reframed as:

RQ1. What aspects of leadership theory encompassed in the conceptual framework constructed for this study are identified in how people who pursued doctoral studies in Educational Leadership at Simon Fraser University experience leadership?

RQ2. What are some implications of how people who pursued doctoral studies in Educational Leadership at Simon Fraser University experience leadership for the design and development of leadership studies programs (formal, non-formal, and informal)?

3.7.3. Pre-analysis Preparation

For this qualitative study, I conducted 22 interviews and collected a large amount of data in the form of text, stored digitally, from the interview transcripts (138,063 words), post-interview reflections (24,980 words), and highlights (10,936 words). Additionally, I handwrote the interview notes and many of the data analysis reflections. To prepare interview transcripts for data analysis, I coded all details that would identify people or institutions from the original interview transcripts and saved them as Confidential

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Interview Transcripts (C_1—C_{22}), which I used for all further data analysis processes. The coding methods I used are described in the next subsection. In my interview notes, interview highlights, and reflections, I was careful not to include any identification details. Before printing, I added headers with the interview number, pseudonym, and page numbers. I set wide margins and double-spaced the text to leave enough white space to write codes, categories, themes, and other interpretive comments during the analysis. Then, I transferred all digital files to a secure drive—original and confidential transcripts, interview highlights, and reflections, along with the consent forms and the recruitment tracking files. At this point, I put aside the interview notes and original transcripts. They would be used further only for verification purposes, if needed. Thus, the database used for this study consisted of the following documents: Confidential Interview Transcripts (C_1–C_{22}), Confidential Interview Highlights (H_1–H_{22}), Post-interview Reflections (M_1–M_{22}), and Data Analysis Reflections (E_i).

3.7.4. Interview Analysis

In analyzing the data collected for the study, I was primarily interested in finding out how people understood, developed, and implemented leadership. These findings would help identify aspects of leadership theory found in practice and provide insights worth considering in the design and development of programs aiming to prepare leaders. The 22 interviews were coded and analyzed separately first to identify themes within them. This was an important step, hence, I allowed for sufficient amount of time and reflection for each interview. Creswell (2016) argued that coding was an important step in qualitative research and an integral part of making sense of text data. Coding involves reviewing the data to find meaning—*de*coding, or to attach labels—*en*coding (Saldaña, 2013). Saldaña (2013) described multiple coding cycles and transitions in data analysis, as well as two overarching coding methods: lumping—an expedient coding method, capturing the essence of a longer data excerpt, and splitting—a more detailed and nuanced coding method, which sometimes took the form of a line-by-line coding. Moreover, Creswell (2016) described three types of data analysis: conventional (codes and categories emerge from data), summative (counting and comparisons), and directed (theory guides analysis). In this study, most of the codes and the themes emerged directly from the data. Thus, the coding methods used were in line with Creswell's (2016) conventional data analysis and incorporated more specific coding methods as described

by Saldaña (2013) and Miles, Huberman, and Saldaña (2020). For this study, I used different stages of data analysis and approached coding using what I called, a *multi-layer eclectic* process. The coding cycles and interview analysis processes are illustrated in Figure 4 and described next.

As mentioned previously, to prepare the interview transcripts for analysis, during the pre-analysis preparation, I coded original interview transcripts digitally using the Attribute coding methods (Saldaña, 2013) to remove all information related to name, institution, program or department, city, job title, and other identification information. At this stage, I tried to be consistent within each interview as I was interested in the context and some of these coded data were further used to extract demographics for the study. For example, I coded:

- **Primary sector:** K-12; PSE; Other

- **Organization:** Research University A, B, …; University A, B, …; College A, B…; School A, B, …; School District A, B, …; Other A, B, …

- **Job title:** Senior Administrator A, B, …; Administrator A, B, …; Principal A, B; Faculty A, B, …; Staff A, B, …; Teacher A, B, …; Other A, B, …

- **Location:** City A, B, …; Province A, B, …; Country A, B, …

- **Name:** Participant Pseudonym; Generic Name ABC; BCD; …

This initial coding phase resulted in confidential interview transcripts, which were used in data analysis. Once all Confidential Interview Transcripts (C_1–C_{22}), Confidential Interview Highlights (H_1–H_{22}), Post-interview Reflections (M_1–M_{22}), and Data Analysis Reflections (E_i) were printed, I first read them all to form a broad understanding of the dataset. While doing so, I continued to take notes on my thought process and any themes that seemed to emerge from data. Next, I piloted the first coding cycle by coding three interviews and reviewed the process to gain more clarity in what worked and what needed to be adjusted. As a beginner in qualitative research, I learned by doing that coding was not a linear process, but an endeavor that involved making judgement calls and frequent changes. I was also able to identify which coding methods were suitable for this study, consulting the ones presented by Saldaña (2013).

Figure 4.   Coding Cycles and Interview Analysis

Confidential Interview Transcripts (C_1–C_{22})
Confidential Interview Highlights (H_1–H_{22})
Post-interview Reflections (M_1–M_{22})
Data Analysis Reflections (E_i)

Read Entire Dataset

Familiarize with the dataset
Form a broad understanding of the dataset
Reflect on possible emerging themes and ideas

Pilot Data Analysis

Try various coding methods

Pre-coding

Pre-coded documents (highlighting)
Data Analysis Reflections (E_i)

Second Coding Cycle

Digital Coding (C_i, H_i, M_i)
Integrate 1st cycle coding
Triangulate within interviews
Review, Refine, Reflect

First Coding Cycle

Transition

Manual coding (C_i, H_i, M_i)
Triangulate within interviews

Word Clouds
Word Frequency

Interviews Themes (IT_1–IT_{22})
Data Analysis Reflections (Ei)
Coding System
Preliminary Cross-Interview Themes

Color-coded (5 areas):
    Transcripts (C_i)
    Highlights (H_i)
    Reflections (M_i, E_i)
Preliminary Coding System

In the first cycle of coding the confidential transcripts, I used the previously coded data to record demographics (Attribute Coding), In Vivo Coding to keep the voice of participants, Process Coding to identify action, and Versus Coding to identify contrast (Miles, Huberman, & Saldaña, 2020; Saldaña, 2013). Although I became more confident in data coding by piloting the process, I realized that I would have to remain open while diving into coding the rest of the interviews and managing the subjectivities as they arose. In order to keep up the momentum, I allowed for dedicated time, organized space, and multiple methods to engage in the data analysis processes.

Prior to beginning the first coding cycle, I pre-coded each interview transcript manually by color-coding and highlighting the following five topics explored using the Interview Guide: Demographics, Leadership Perspective, Leadership Development, Leadership Implementations, and Other/Unexpected. These topics became the concentrated areas that guided the coding and analysis processes, as well as reporting the findings of the study. At this stage, I also noted separately any emerging themes or categories, which later evolved in a coding system of the study.

The excerpt presented in Figure 5, belongs to Margaret, one of the study participants, and provides some insight in this coding process.

Figure 5.   Coding Sample

Transcript #	Coding
A3: Well, what leadership isn't is telling people what to do and directing. And it's not managing.	**Leadership isn't…** Telling people what to do Directing Managing
For me, leadership is working together with others to create a vision for the future; working together to achieve that and continually gathering perspectives along the way through the progress that we're making, so that we're all working together." (Margaret, pg. 8)	**Leadership is…** Working together to (Goals) Create a vision Future (focus on) Achieve (vision) Gathering perspectives Making progress Working together (outcome=collaboration)

The keywords and phrases highlighted in green were considered possible codes to use in the next coding stages. This example showcases multiple coding methods used throughout the study: Process—indicating action, in the form of "-ing" verbs such as

telling, managing, or *working*; In Vivo—exact words used by participants; Versus—contrast between what leadership is or is not; and researcher generated—such as *collaboration* used later in the process to indicate *working together* as outcome of leadership implementation.

In the next transcript review, using pens in the same colors as the highlighters, on the right-side margins of the transcripts, I recorded the keywords and phrases highlighted in the preliminary coding, which could be used in subsequent coding. These highlighted keywords were handwritten under the a priori themes *Leadership is…* and *Leadership isn't….* belonging to the *Overall Perspective of Leadership* area of findings. The use of parenthesis indicated additional information to consider or a brief explanation.

For example, in the second use of the code *working together,* I indicated in parenthesis that it could indicate a leadership outcome since Margaret used the phrase *so that.* Also, in the latter stages of coding, the first group of codes included in *Leadership is…* could be categorized as *Goals* while the second could be categorized as *Outcomes.* Wherever I considered that there was an overlap between the areas of findings or themes, I indicated that with the corresponding color highlight. In the provided example, what is highlighted in orange could be categorized as part of the *Leadership Implementation* area of findings, as well. Finally, from time to time, though it is not shown in this example, I made notes on the left-side of the transcripts with thoughts and questions about what I was reading for later consideration. Upon coding an interview, I triangulated the transcript with the notes and post-interview reflections to ensure that I did not miss important details that could add to the understanding of the participants' perspective. I also noted any discrepancies or ideas within the interview documents, which I needed to reflect on or return to later. In the example above, the overlap between areas of findings indicated as different color highlighting (i.e., orange) and the use of parenthesis specified areas to revisit once I advanced in the data analysis.

In qualitative studies, coding systems can take various forms and their primary purpose to organize the codes and categories that emerge during analysis (Creswell, 2016). I guided the first coding cycle by using the five areas of findings: Demographics, Overall Perspective of Leadership, Leadership Development, Leadership Implementation, and Other/Unexpected. I also started a list of codes, which were further

grouped in categories or themes in the subsequent stages of data analysis. For example, in reviewing the transcripts, I noticed that participants used common words such as *decent, reasonable, strong,* or *approachable* to describe how they approached leadership. As well, I noticed that some participants used words that appeared in the leadership literature such as *distributive, pragmatic,* or *situational.* These words became In Vivo codes that I later grouped together in two categories—*everyday language* and *established terminology*. I also looked for phrases that I could generate codes for, such as *quite good at my job*, which I eventually coded as *skilled.* Furthermore, in the code (re)organization process, since many participants talked about how they perceived themselves as leaders, I logged a theme emerging from data, which I called *Perception of Own Leadership*. The theme was later recorded in the Coding System (see sample in Figure 6) and reported on as part of the *Overall Perspective of Leadership* area of findings. In the case of a priori themes, I used similar coding methods and my judgement to categorize the codes and further refine the themes.

Upon completing the first coding cycle, I had a good idea about themes within the interviews and several initial connections in the dataset that emerged across the interviews. Nevertheless, these connections needed further refining, to which I paid careful attention in the later phases of data analysis. In order to form a better picture of the dataset and what it may say, I transitioned to the second coding cycle by using the Wordle Desktop application to create visuals for interviews and record word frequencies. The word clouds provided a snapshot of each interview and the entire dataset and relevant words to use in organizing the data whereas word frequencies showed some words that were commonly used throughout the interviews. However, using these tools did not provide additional insights into the data and were not incorporated in the analysis.

The second coding cycle involved integrating the Confidential Interviews Transcripts (C_1–C_{22}), which were coded manually during the first coding cycle and Confidential Interview Highlights (H_1–H_{22}), which were created digitally in the preliminary data analysis. This was a rigorous and extensive process, which required careful consideration and thinking. The process involved looking for further ways to group the codes and work on "themeing the data" (Saldaña, 2013, p. 175) by embedding the manual codes from the first coding cycle within the digital template provided by the Interview Highlights and developing this document further for each interview.

The result of the coding methods described above is illustrated in the Figure 6, which is an excerpt from the Coding System created for this study.

Figure 6.   Excerpt from the Coding System: Illustrating an Emerging Theme

Area of Findings 1. Overall Perspective of Leadership
(a priori)
Theme 1.2. Perception of Own Leadership (emerged)
includes references to how participants see themselves as leaders (1.2.1; 1.2.2), their approach to (or style of) leadership (1.2.3), and what they focus on in their practice (1.2.4)
**may include specific traits, attributes, skills, or direct references to own leadership approach or focus*

Category 1.2.1. Everyday Language (emerged)
Decent *(In Vivo Code)*
Reasonable
Approachable
Learner
Skilled (Researcher-generated code for "quite good at my job")
….

Category 1.2.2. Established Terminology (emerged)
Distributive
Pragmatic
Situational
Relational
….

This process was iterative and entailed reviewing, refining, and reflection on the process, as well as triangulation between the corresponding documents: interview transcript, highlights, and post-interview reflection. The main outcome of the second coding cycle was the Interview Themes (IT_1—IT_{22}) documents. These documents were structured following the five areas of findings and encompassed emerging themes and evidence from the interview. The five areas of findings maintained the color-coding established previously, were organized so each started on a separate page, and included headers and page numbers to ease grouping or re-grouping in the cross-interview analysis. The document structure and the use of different colors provided easy data manipulation in the later stages of analysis. In reviewing the transcripts again, I also extracted longer quotes that seemed relevant and were not selected in the preliminary analysis. I continued to reflect on the process, note emerging themes, and refine the Coding System (Figure 7).

Figure 7.   Coding System: Description and Use

- **Themes** within the five **Area of Findings** are based on interview questions (a priori) or (emerged) from data. Categories, Subcategories, and Codes emerged from data.
- Included in each **Theme**: Categories emerged from data and examples of Subcategories and/or Codes included with the **Theme** or Category. Specific codes and evidence (quotes) are found in Interview Themes
- **Area of Findings** and corresponding **Themes**, Categories and Codes are color coded
- In the document called *CodingSystem,* **Themes**, Categories and Codes that are found in more than one interview are noted once (grouped or condensed); in cross-interview analysis, unique features are drawn from individual interviews
- **Themes**, Categories and Codes are condensed further in cross-interview analysis
- When **Themes** or Categories appear in more than one **Area of Findings**, a brief note is made about why I decided to include it there
- **Themes**, Categories, and Codes are created primarily using participants' words or phrases; synonyms were grouped, and the most relevant keyword or phrase is used for further coding
- The Coding System evolved throughout the data analysis and consists of the following groups of documents:
  - Coding System *(*overview of data coding, *CodingSystem)*
  - Themes within Interviews (interview analysis, second coding cycle, *ThemesX* & *ThemesX B*)
  - Themes within Area of Findings (cross-interview analysis, *AllThemes* & *AllThemes B*)
  - Area of Findings (used for writing the report, *TopicX*)
  - References can also be made to
    - manual coding: hard copies of Interview Transcripts (1st coding cycle), post-interview reflections (*MemoX*), and Interview Highlights (*IHX*)
    - Reflections on data analysis processes, made in the form of hand-written (notes, graphs, memos) or digital data analysis journal entries (*EntryX*)
- Notations used throughout the overall Coding System:

Area of Findings X: (based on interview guide)
X.Y. Theme: Name (a priori) or (emerged)
Description
X.Y.Z. Subtheme: Name (a priori) or (emerged)
Description
Category
Subcategory (if applicable)
Code

I also recorded important steps in the process or insights that I could use in cross-interview analysis. At the same time, I started recording themes and categories in a new document, which guided the initial stages of cross-interview analysis and later became the Coding System. Various but consistent notations, font sizes and styles were used in this description and throughout the documents to differentiate between elements of the Coding System.

Analyzing the interviews was an iterative process. Triangulation within each interview and going back and forth between the documents developed during the data collection and analysis, member-checking, and continuous reflection helped improve the trustworthiness of the interview analysis. In all stages of this process, I learned to deal with ambiguity and ill-structured knowledge better. By engaging in reflection, not only did I make sense of the qualitative analysis processes and make better procedural decisions, but I became aware of how much more complex leadership phenomenon was in practice than I expected. Although there was some assurance that my preliminary data analysis and interpretation were accurate, based on the feedback received from participants when reviewing the interview transcripts and highlights, I found that by the end of interview analysis phase, there was still work required to clarify meaning and understanding of how participants related to leadership. In later stages of the study, at times, I had to go back to individual interviews for clarification and corroboration. I can argue that, in fact, the interview analysis as defined in this section did not end until the completion of the study.

3.7.5. Cross-interview Analysis

With data already coded, this phase of data analysis was about further condensing and refining existing or emerging themes. The steps taken for cross-interview analysis are presented next and illustrated in Figure 8. Some preliminary connections between how concepts or events were presented by participants became apparent as early as the data collection phase and continued during the interview analysis. These ideas proved useful while conducting the cross-interview analysis.

Figure 8.   Cross-interview Analysis

Cross-interview Analysis Phase 1

Demographics

Overall Perspective of Leadership

Leadership Development

Leadership Implementation

Other/Unexpected

Interview Themes (IT$_1$-IT$_{22}$)
Data Analysis Reflections (Ei)
Coding System
Preliminary Cross-interview Themes

Preliminary Cross-interview Analysis

Cross-interview Analysis Phase 2

Analyze each of the 5 areas
(Re)organize
(Re)integrate
Review, Refine, Reflect

Cross-Interview Themes (CIT$_i$)
Coding System
Integrated Findings

Triangulate across Interviews
Integrate Researcher's Reflections

Triangulation

Preliminary Findings

Member-checking

Review, Refine, Reflect

Findings

This stage of data analysis was an iterative process that I followed until no new ideas, concepts, or themes seemed to emerge from data (Mason, 2010). In preparation for this stage of analysis, I printed the Interview Themes (IT_1-IT_{22}), new Data Analysis Reflections (E_i), the Coding System, and the Preliminary Cross-Interview Themes documents. I then grouped and read the pages corresponding to each of the five areas of findings: Demographics, Overall Perspective of Leadership, Leadership Development, and Leadership Implementation, and Other/Unexpected. I conducted the cross-interview analysis in two phases. The first phase consisted of analyzing each of the five areas separately by looking at similarities, differences, and unique features across the interviews. In writing the Interview Themes (IT_1-IT_{22}) documents, I was consistent in recording and formatting the five areas of findings and embedded themes to help with the cross-interview analysis. For this first phase, I used the printed documents and a large surface to provide space to move pages or excerpts that were similar and relevant to a theme. To create the broad view of each of the five areas of findings, I began by mixing and reading sections of the Interview Themes (IT_1-IT_{22}) corresponding to each area several times, recording separately any relevant ideas that emerged. I also continued refining the Cross-Interview Themes (CIT_1 - CIT_{22}), along with the Coding System. Working through this data analysis phase to find what themes emerged from the data across the interviews posed more difficulty than working with the a priori themes. In the first several reviews of the cross-interview themes, I made changes often as my understanding of the five areas of findings formed. Some categories seemed to fit in multiple themes or not fit at all. By my remarking what participants said about a specific issue and noting how and why I made changes or decisions, some cross-interview themes emerged in these reading and reflection.

The following example showcases how I worked from the raw dataset to the themes that I considered emerged across the interviews. While reviewing the documents corresponding to the *Leadership Implementation* area, I found a note I made during an interview analysis about *focus on students*. I thought I had read something similar in other interview transcripts, but I was not certain. Keeping this in mind, I continued to read with the purpose of finding out what others said in their interview about *students*. This process of analysis is close to the constant comparison method used in developing grounded theory. I noticed that not only did participants emphasize students as the main stakeholder of their leadership, but they talked about various facets of what their work

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involved in relation to students. Also, a quote stood out in Avery's interview, which I thought encompassed what the others said: *"we teach all students" (pg.16)*. Thus, I used this quote to label the emerging theme—*Focus on students: "We teach them all".* Several categories emerged related to *creating access to education, "love the kids", support, power struggles, recruitment, retention, learner-centered environment,* and *student experience*, which I began to group within this theme. Participants talked about students throughout their interviews not only when I specifically asked about it in the *Leadership Implementation* part of the interview; hence, I grouped or moved other categories and codes from other parts of interviews to this theme. Later on, as a major theme that I called *Foci of Educational Leadership* emerged from the data*, Focus on Students: "We teach them all"* became a subtheme that I called *Students: "We Teach Them All".* I included it here along with *Teachers: "We Team [Students] Well"* and *Community: Building Strong Relationships.*

This example illustrates the complexities of qualitative data analysis, particularly when conducting bottom-up analysis. The process involved not only coding and themeing the raw data but finding appropriate labels and creating visuals of possible data connections. At times, the analysis required that I complete what might seem routine tasks with patience and persistence, as well as engage in continuous reflection on what the data may say, the steps taken, and the decision made. This was by far the most time- and energy-consuming task of the data analysis, which was also acknowledged by Miles, Huberman, and Saldaña (2020). As I progressed (i.e., not ceasing to read and reflect on what I was reading) in analyzing each area of findings in detail, I continued to engage in "data transformation" (Miles, Huberman, & Saldaña, 2020, p. 155), make changes, condense the data, and refine the emerging themes as they seemed to align with one of the five areas. At times, this did not seem like "progress" but rather, a lack thereof. This first phase of the cross-interview analysis was an iterative process until themes and evidence seemed to make sense and be somewhat organized. Although complex and non-linear, the process was particularly useful to go through as concepts seemed to fall often within multiple areas, themes, or categories, which was also illustrated in the example provided earlier. Therefore, integrating similar data and connecting concepts and events helped improve the clarity of emerging ideas and strengthen the themes within each of the five areas explored.

In the second phase of the cross-interview analysis, I continued to analyze and refine each area, by iteratively reading through the Cross-Interview Themes (CIT$_1$-CIT$_{22}$), as well as organizing and integrating the findings in preparation for writing the study report. At this point, I triangulated across interviews. By reviewing and integrating my reflections written throughout the data collection and analysis, I refined the coding system, which ultimately became the draft outline of the Findings Chapter. Upon writing the Preliminary Findings, I went back to the transcripts to verify the accuracy of quotes and reported findings. At this stage, I also employed member-checking by sending a copy of the preliminary findings to all participants, inviting feedback and comments on three main areas: (a) how I interpreted and integrated their interview with the others' interviews; (b) what I may have missed, including quotes from the interview, or points that they considered needed revisions; and (c) anything I planned to use from the interview but they would prefer that I did not in the final reporting of findings. Within a two-week suggested timeframe, 9 participants responded, confirming the accuracy of findings related to their interview. One participant asked for clarification on the context in which a selected quote was used, resulting in my revising the paragraph to make the connection less ambiguous.

The findings of this study, presented in the next chapter, are the result of a rigorous process that involved careful data collection and analysis, as described in the previous sections. Throughout the processes, I recorded my decisions and endeavored to be both creative and accurate in my research activities. The research questions and the topics explored in interviews guided all stages of data analysis while leaving room for innovation and play. Naturally, there were tensions and questions, along with frustration and enjoyment on this "very complex endeavour" (Elliott & Timulak, 2005, p. 155) called qualitative analysis. But the adopted methods or "practices of inquiry" (Gergen, 2014, p. 51) helped me navigate the uncertainties encountered.

3.8. Saturation

Saturation in qualitative studies was defined as the point where no new information, concepts, or themes emerged, or when the study could be replicated (Elliott & Timulak, 2005; Fusch & Ness 2015; Mason, 2010). Fusch and Ness (2015) claimed that there was "no *one-size-fits-all* method to reach saturation" (p. 1409, original emphasis) and that saturation methods took different forms depending on the type of

study. For them, collecting both rich and thick data, as well as data triangulation, were important in reaching saturation. Moreover, Saunders et al. (2017) argued that saturation was "matter of the analyst's decision" (p. 1901). There were several accepted strategies in reaching saturation in qualitative research—theoretical, thematic, a priori, and data— and saturation appeared to occur after five to fifteen interviews although larger samples were common, depending on the studied phenomenon or methodology used (Mason, 2010; Saunders et al., 2017).

Considering the various forms of reaching saturation, I determined that saturation for this study would occur when either themes emerging from interviews seemed repetitive (inductive thematic saturation) or data seemed to repeat itself (data saturation). As a result of the recruitment processes described earlier, I recruited 22 potential participants for this study. My planned approach to data collection was to begin interviewing people in the order they indicated their willingness to participate and as they were available for an interview within the timeframe set for data collection. I would then engage in preliminary data analysis after each interview. If by comparing the current interview with previous ones, saturation seemed to have occurred before interviewing everyone, I would interview the next two participants to confirm saturation. When saturation was confirmed, I would contact the remaining potential participants and offer to interview them if they strongly desired to have their voices heard on the topic by participating in this study.

Nevertheless, in the data collection and preliminary analysis processes, I found that I was more concerned with the quality of data I collected rather than a point where I could argue that saturation has occurred (Mason, 2010). I was also eager to interview participants and listen to their stories of leadership. Although for some emerging themes I could argue that saturation occurred after the first several interviews (e.g., Leadership as lifelong learning, Leadership is developed by engaging in dialogue with others, or Leadership emerges when supporting others), for other themes, particularly related to contextual aspects of leadership implementation, new and more intriguing ideas continued to surface. As saturation did not seem to occur for all the topics explored, I interviewed all people who consented to participate in the study. As mentioned earlier in the chapter, this approach altered how I initially framed study. Nevertheless, I found great value in interviewing all 22 participants who responded to my invitation as they shared remarkable viewpoints. They also helped me collect rich and thick data to

interpret and describe the complexities of the leadership phenomenon while remaining "reasonable in scope" (Baxter & Jack, 2008).

3.9. Trustworthiness

My ethical obligations as a researcher in conducting this study were to find ways to recognize and corroborate meanings from the data and minimize misinterpretation and misunderstanding. A major part of qualitative studies is the researcher's interpretation of the data collected. Without the researcher's reflection and careful attention to the message conveyed by participants, the findings may be rooted in the researcher's unconscious biases and preconceptions. Although what is reported may be meaningful to the researcher, it is important that protocols be put in place to ensure that the study is based on the views of participants regarding the phenomenon (Elliott & Timulak, 2005; Patton, 2015; Stake, 1995). To address issues related to trustworthiness of this study, I used several techniques: member-checking and transcript verification; keeping a reflective journal and critically challenging first impressions and when necessary, revising interpretations; developing a coding system; continuously looking for what I may have missed or misunderstood; and data triangulation within and across the interviews and with my systematic reflections to ensure that the data gathered for the study enabled me to see different perspectives of how the phenomenon was experienced in different contexts (Briggs et al., 2012; Creswell, 2016; Schnelker, 2006).

To begin with, transcript verification and member-checking techniques are often used to improve credibility and accuracy of qualitative studies (Creswell, 2014, 2016; Miles, Huberman, & Saldaña, 2020; Patton, 2015). As such, throughout the study, but particularly in the data collection and preliminary stages of analysis, I kept the lines of communication with participants open. I asked participants to review their own interview transcript for accuracy and meaning and if necessary, adjust the message, so it was conveyed as intended. Along with the transcript, I sent a one-page Interview Highlights that provided participants with my initial understanding of what was shared at the interview and how it could be used in further data analysis and interpretation. In addition, during the interview, several participants offered to provide feedback on early findings. This technique was also used to ensure that the presentation of findings did not put at risk unintentionally participants, actors in their stories, or their institutions. Upon sending participants a draft of the early findings, I heard back from 9 out of 22 participants. They

provided me with positive feedback, which was an indication that the findings were reflecting accurately what participants shared in interviews and how I interpreted that.

Moreover, I took notes and engaged in reflection throughout the data collection, analysis, and interpretation processes. My post-interview reflections became part of the dataset. They were recorded shortly after the interview to preserve the accuracy of the situation and possibly identify issues that may have been missed and required follow up. Before destroying the audio recordings of interviews, I listened to each one at least two times (to check the audio quality and verify the transcript before sending it to participants), so I reflected not only on what was said, but also how. Throughout the study, my reflections referred to what I was doing and why, as well as ideas emerging in and about the process. I found that reviewing these reflections at various times helped with presenting the themes and corresponding evidence, as well as understanding the decisions made and the rationale behind them. As the researcher, my responsibility was to uncover meanings and new interpretations and new knowledge about the studied phenomenon from participants' perspectives (Fusch & Ness, 2015; Gergen, 2014). Yet, because there is no way to control the reader's perception of what is reported, this may inadvertently materialize in "new illusions" about the phenomenon (Stake, 1995). Although the goal of a qualitative study is to provide an accurate description of the phenomenon, this description is limited and if appropriate measures are not taken, it may be framed based on the researcher's experiences with the phenomenon or their unacknowledged biases (Bogdan & Biklen, 2003; Fusch & Ness, 2015). Hence, the need for the researcher to keep detailed records of the implemented procedures, dilemmas, experiences, and assumptions for the duration of the study (Bogdan & Biklen, 2003; Creswell, 2016).

Finally, discipline in data collection and analysis coupled with data triangulation helped increase the credibility of the study (Miles, Huberman, & Saldaña, 2020). Triangulation protocols helped recognize the different perspectives of participants and provided an accurate and credible description of the studied phenomenon. Triangulation was done within and across interviews, as well as with my systematic reflections. Also, by combining manual and digital methods of coding and analysis, I was able to see the data from different perspectives, grasp better what participants said, and organize the findings logically. The use of these methods and the development of a coding system showed the rigorous process of analysis followed in this study.

3.10. Study Characteristics

This qualitative interpretive study was conducted primarily to search for meaning and understanding and write a richly descriptive story of leadership (Merriam & Associates, 2002). The story was written by integrating and synthesizing the topics explored in the interviews. I conducted the study to understand how participants conceptualized, developed, and implemented leadership, as they emerged from their experiences with leadership in order to identify aspects of theory that were present in practice and implications that these experiences might have for the design and development of leadership programs. The study met the core characteristics of qualitative research: it revealed participant perspectives about the leadership phenomenon; the researcher was the key instrument for data collection; the researcher communicated directly with participants; the interviews and the researcher's reflections were used for data collection; participants' selection was justified and some of their characteristics were described; data was analyzed both inductively and deductively by working back and forth between research questions, themes, and dataset; it explored the leadership phenomenon in an open-ended way; design was emergent and the researcher reflected on how the processes unfold over time; presented a holistic picture of the studied phenomenon based on prior research, participant perceptions, and the researcher's observations; it provided a complex understanding of the leadership phenomenon by revealing its multiple facets; and the research incorporated trustworthiness strategies (Creswell, 2014, 2016; Elliott & Timulak, 2005; Merriam & Associates, 2002; Patton, 2015).

3.11. Ethical Considerations

3.11.1.   Participation in the Study

To alleviate ethical concerns, I created a Consent Form (Appendix D) and a detailed email (Appendix B) that described the study, its purposes and expected outcomes, and recruitment processes. Participants also received the Interview Guide along with this email. They were asked to review all information and if they were interested in participating, to let me know and provide me with the signed Consent Form prior to the interview. I collected the forms from all participants and a copy was stored

digitally on a secure drive, along with all files associated with this study. Any paper copies were destroyed, and any digital copies were deleted from all electronic devices.

In addition, participants were given the choice to withdraw from the study at any time with no consequences. They could communicate their decision to me or my faculty supervisor by email before or after the interview, or verbally at the interview. As a thank you for their participation in the study, participants received a $15.00 gift card at a local coffee/tea shop at the interview or by mail. The gift card was promised even if they decided to withdraw from the study during or after the interview. No participant withdrew from the study.

3.11.2. Data Collection

To ensure privacy of conversation, face-to-face (14) interviews were held at a time and location agreed upon and remote interviews were conducted from home using Google Hangouts (4), Skype (2), Zoom (1), or a landline (1). All interviews were recorded with a portable digital voice recorder and transferred on a password protected laptop that was used for the duration of the study. Interviews were transcribed verbatim and original transcripts were saved on a secure drive. Once the interviews were transcribed, I verified them following the audio recording. Then, I sent the interview transcript and Interview Highlights to each participant for verification and asked that they let me know of any changes within two weeks. Once I heard back from participants or the two-week deadline passed, I prepared the confidential transcripts. I kept a backup of all audio interview recordings on a secure drive until the study was completed.

3.11.3. Data Storage and Use

Prior to printing the interview transcripts and reflections for data analysis, I prepared confidential transcripts by coding information that might incidentally identify participants, actors in the stories, or institutions. In writing the interview notes and highlights, I made sure that there were no identification details. To distinguish between files associated with each participant, I used a combination of identifiers such as the participant's pseudonym, interview number, and the type (e.g., Interview, Highlights, Interview Themes, Cross-Interview Themes, or WordCloud).

Throughout the data collection and analysis, I made file backups regularly on a secure drive to prevent accidental loss or corruption of files. There were no major issues encountered related to data storage and use. Upon study completion, I transferred all digital files associated with the study on a secure drive that will be kept for five years, per SFU Office for Research Ethics requirements. At that time, I also conducted an audit on my laptop, email, and SFU Vault to ensure that all files associated with the study were permanently deleted.

3.11.4. Write-Up and Dissemination of Results

As soon as an interview was completed and verified, I saved all files associated with it to include the interview number and the chosen pseudonym rather than the real names of participants. In the process of transcript reviews, multiple coding cycles and data analyses, I associated the interviews with the pseudonyms, as well. I found this method useful in disconnecting myself (as the researcher) from participants (as individuals) and in connecting with them through their experiences shared in the interviews and their pseudonyms. By a certain point in the analysis, in my mind, participants and their interviews were associated with the pseudonym and what they said rather than the individuals and their real names. This would help in the dissemination of results phase by lowering the risk of incidental disclosure of names and individuals. In the written report of findings, I identified participants using a pseudonym and I was careful not to disclose any identifiable or harmful information. I did not use extensive stories of leadership that participants shared in the interviews but an analysis of their experiences and illustrative quotes. I also followed up with participants to double-check that they were comfortable with my using the selected quotes from the interview or details that they shared with me that I considered sensitive, as well as solicited feedback on preliminary findings.

3.12. Chapter Summary

This chapter presented the methodological approach used to collect and analyze data for this study, which aimed to investigate the leadership phenomenon as emerged from analyzing the participants' stories. I used an Interview Guide, which was designed based on the conceptual framework constructed for the study, to collect data related to

participants' experiences in their development and implementation of leadership. Data was analyzed first to identify themes within the interviews and then, across interviews. To ensure trustworthiness, I used transcript review, member-checking, and integrated my systematic reflections for triangulation.

At the beginning of this chapter, I described how I initially struggled to find a methodology that would be appropriate for this research study. By reading widely about qualitative approaches, reflecting on their purpose and applicability, and deciding carefully on how to approach the next step of data collection and analysis, I was able to engage in the methodology presented in this chapter. The next chapter presents in detail the study findings on how participants conceptualized and practiced leadership in the following areas: *Overall Perspective of Leadership, Leadership Development, Leadership Implementation,* and *Leadership: The Unexpected.*

Chapter 4.   Findings

4.1. Introduction

In the previous chapter, I presented in detail the methodological approach adopted in this study to illustrate how the data was collected and analyzed. The major part of this chapter focuses on the findings that emerged from the dataset organized by the primary areas explored in the interviews: *Overall Perspective of Leadership, Leadership Development, Leadership Implementation,* and *Leadership: The Unexpected*. The findings corresponding to these primary areas are then integrated in *The Facets of Leadership: Integrating the Findings* section. The chapter also includes a section dedicated to *The Surprising Elements* of the study. To give the reader an idea about the context that participants drew their leadership stories from, in the next section, I present the participant demographics. In the third section, I focus on the primary area of findings that illustrates participants' overall perspective of leadership in terms of what informs it, how they perceive their own leadership, and how they define leadership. In the fourth section, I present findings related to the pathways to leadership and the role that past experiences, education, and dialogue with others had on how participants developed their leadership. In the fifth section, I detail the diverse aspects of leadership implementation such as context, foci of educational leadership, core leadership tasks, as well as struggle and success in leadership. In the sixth section, I present two areas of unexpected findings related to systemic and organizational barriers and organizational renewal, as well as other findings. The latter part of this chapter aims to synthesize the study findings and show how the leadership domains and dimensions surface in practice. I then present some insights that emerged from the data related to how participants perceived this study and their own role in it. This chapter concludes with the key findings emerging from the dataset, which lead to the discussion chapter of the dissertation.

4.2. Demographics

In this study, I explored, analyzed, and interpreted stories of leadership drawn from a variety of leadership roles, organizations, and sectors to identify aspects of established leadership theory that prevailed in how participants experienced leadership.

To identify participants in this study, I used pseudonyms, most of which were chosen by participants (see Table 2). I selected pseudonyms on participant's behalf when they asked me to. In three instances, I also changed the pseudonyms chosen by participants in order to provide more clarity in reporting the findings. To maintain participants' confidentiality, I needed to make choices on what specific demographics to report (Miles, Huberman, & Saldaña, 2020). Considering participants' profiles and some of their leadership experiences, it may have been possible to identify them if detailed individual demographics were reported. Hence, I chose to present demographic data briefly and collectively.

Table 2.   Participant Pseudonyms, EdDL Cohort, and Primary Sector

Pseudonym	EdDL Cohort	Primary Sector		
		K-12	PSE	Other
Alex	F	–	✓	–
Amber	C	✓	–	–
Avery	H	✓	✓	✓
Emma	F	–	✓	✓
Ernest	A	–	✓	✓
Hannah	A	–	✓	–
Hope	J	–	✓	–
Jake	A	–	✓	–
Jesse	H	✓	–	–
Johnny	F	–	✓	–
Joy	G	–	✓	–
Maggie	D	–	✓	–
Margaret	C	✓	–	✓
Maril	G	–	✓	✓
Mercedes	C	✓	✓	–
Noah	G	✓	✓	✓
Shirley	F	–	✓	–
Spike	D	✓	–	–
Sunny	A	–	✓	✓
Timothy	I	–	✓	–
Victoria	B	–	✓	–
Zachary	F	–	✓	–

The 22 participants (11 male and 11 female) in this study were part of 10 (out of 16) Educational Doctorate in Leadership (EdDL) (English) cohorts. They were at different

career stages (from mid-career to retired) and had worked across multiple sectors, organizations, roles (including leadership roles), or geographical regions. At the time of their interview, participants were working in 14 different organizations in a variety of roles and 20 of them were residing or working in British Columbia.

Participants had complex career backgrounds and worked across multiple sectors. It is worth noting that the Primary Sector in Table 2 refers to the sector which participants drew their stories from and does not necessarily reflect the sector participants worked in the longest or at the time of their interview. Seven participants drew their stories from their experiences in K-12 (school, district, or board of trustees), 18 from post-secondary (faculty, staff, departmental administration, and senior administration), and 7 from corporate leadership. Many participants shared stories from more than one sector, which resulted in a rich and thick dataset and increased the quality of findings.

4.3. Overall Perspective of Leadership

The first main area of findings was related to the participants' overall perspectives of leadership. Understanding their overall perspective of leadership was useful in contextualizing their stories and analyzing them to form the overall picture of the leadership phenomenon as it emerged from the dataset during the analysis. There were two a priori themes related to this area, which were investigated in the interviews: *What Informs Participant's Perspective of Leadership* and *Defining Leadership.* One other theme that emerged from the dataset was *Perception of Own Leadership.* The following subsections present the findings consistent with each of these three major themes, focusing on common findings, as well as differences and unique features. For aspects directly related to development and implementation of leadership, in this section, I provide an overview of the findings. Then, I elaborate on these areas and provide more evidence in the subsequent sections of this chapter, which correspond to leadership development and implementation.

4.3.1. What Informs Participant's Perspective of Leadership

Participants considered leadership a long and intricate journey, rooted primarily in a keen interest in leadership conceptualization, as well as exposure to or involvement

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in different aspects of leadership practice. For many participants, leadership *"has always been a key part of my being" (Avery, pg. 3)*. Generally, their leadership was *"constantly informed about what leadership is and how that pertains to [different people and contexts]" (Jesse, pg. 2).* As people brought different perspectives, styles, and experiences from real life situations, the richness of engaging different viewpoints in addressing leadership issues was acknowledged by all participants at some point in their interviews. Participants' leadership seemed to be informed by a variety of sources from their past experiences, their personal, educational, or professional aspects of life and organizational culture or view of leadership. Findings related to those sources that were perceived by participants as informing their leadership are briefly presented in the following subsections and in more details later in this chapter, as they pertain to leadership development and implementation.

Socio-cultural Experiences

When referring to how different aspects of their past experiences informed their leadership, participants mentioned personal, educational, and work or volunteer related experiences. Many participants mentioned the roles that family members, teachers, students, or friends played in how participants conceptualized leadership, either during their formative years or in adulthood. Aspects of participants' parenting were also perceived as an exercise of leadership. For example, Jake stated that as leaders, *"we are responsible for other people the way that you become when you're a parent or a teacher" (pg. 24).* As a leader, one *"can't give the responsibility away" (Amber, pg. 22).* Alex compared leadership with teaching and guiding people patiently until they "got it". He, along with other participants, felt responsible to help people grow by offering constant support and addressing the "why". Cultivating meaningful relationships and encouraging others to assess the level they were at and possibilities for growth were considered key to leadership: *"…people that you're working with, and where they are in their journey, and how you help them move forward in their journey—that's the biggest perspective [of leadership] for me" (Amber, pg. 1).*

Furthermore, several other aspects of social life such as movies, arts, politics, history, or philosophy were considered relevant sources. Hannah, for example, described in detail how some of these influences helped her conceptualize leadership and identify stereotypes or societal issues that were promoted through their conveyed

message. Two other participants shared how they used examples from movies or music to exemplify issues that arose in practice or create metaphors that resonated with people they interacted with. A group of participants also highlighted that they learned from the early explorers' expeditions about endurance and focus on people, which became overarching goals of their own leadership. As this reference was curious to me, I looked at the list I used for recruitment and observed that some of them—not all—were part of the same EdDL cohort. This finding made me think of the social influences in learning processes. Other participants showcased through examples how ordinary daily activities and interactions generated valuable lessons applicable in leadership areas (e.g., repairing a car, folding laundry, conversing about a movie, or probing a teenager's words or actions). From analyzing the stories that participants shared, it looked like socio-cultural experiences made an important impression on how they perceived leadership.

Mentors and Role Models

Participants also shared stories about formal and informal mentors or leaders who served as role models for their leadership. To differentiate between mentors and role models in reporting the findings, I refer to a mentor when the example provided by participants was about someone they called "mentor" or someone they learned from through direct interactions. Then, I refer to a role model when participants referred to someone as their "role model" or an observed leadership approach they emulated in practice. In general, participants recognized the need for and the value of having multiple models of leadership to draw from. Many evoked what they learned from "excellent" leaders and acknowledged that they emulated these approaches in practicing leadership. In contrast, learning from "terrible" leaders often seemed to have had a more substantial impact as participants experienced first-hand how it felt to be the "*consumer of [bad] leadership" (Mercedes, pg. 2)*. Thus, not only observing other leaders, but being involved in different forms of leadership interactions provided valuable learning for participants in their roles as leaders, collaborators, or followers.

Experiences showing that their contribution made significant impact on others or that they served as role models for others also added to their view of leadership. Some participants mentioned how "critical friends" and those who held them accountable affected their leadership practices, like Spike who sought feedback from those who were *"not always cheerleaders, [but] had a really helpful perspective on what I was doing and*

helped me think about what I should be doing" (pg. 15). These experiences were conducive to reflection and learning from reflecting on experience. As this section is meant to provide an overview of participants' perspective of leadership, more about how others contributed to participants' leadership are presented in the sections related to leadership development and implementation.

Education

Various forms of education were acknowledged as important sources of knowledge for participants' leadership. This was expected as all participants pursued a doctorate to learn about leadership. A few participants referred to specific courses or experiences from their K-12 or post-secondary (PSE) education as informing their leadership. Yet, a valuable component of their leadership development was the learning space created by the doctoral program, which provided participants with access to diverse perspectives, leadership roles, expertise, and interests. Staying up-to-date in terms of leadership literature, understanding and trying out different theoretical frameworks, being informed about new or developing issues in the field, and engaging in individual or collaborative research were perceived as informing leadership, as well. What was important for Maggie in a leadership role, for instance, was to develop an evidence-based practice *"instead of just picking the flavour of the month and bringing that in […] our own work" (pg. 3).* Similarly, Zachary and Shirley talked about instances when they shared relevant literature with their teams to help them address specific practical issues.

Some participants also mentioned the importance of participating in ongoing professional development opportunities offered by their employers or professional associations, such as conferences or workshops. But generally, these did not seem to have the same effect on their leadership as formal education. As several mentioned, this could be because the short duration of these opportunities did not give the space to deeply explore and reflect on leadership issues that were investigated. However, combined with formal education, these types of events gave participants opportunities to engage in dialogue about theoretical and practical aspects of leadership, which helped them with their leadership implementation and/or offered a space to share their expertise.

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Work and Volunteer Experiences

Previous work and volunteer experiences directly or closely related to leadership (e.g., teaching, counselling, and involvement with unions, professional associations, or cross-institutional projects) were cited by participants as informing their leadership. Moreover, trial and error approaches and a better understanding of past experiences, especially challenges or mistakes, seemed to help participants, encourage change, and prevent stagnation of their organizations. Having the big picture understanding and being able to grasp complex situations, find the origin of problems, and act accordingly was perceived as resulting in more profound change. As Hannah said, in general,

> we [society, organizations, or individuals] continue to repeat history because leaders, for the most part, fail to understand the complexities that we're dealing with […] Because they don't understand where things emanated from, [they] will continue to repeat it because they really don't understand and aren't addressing the problem. They often address the symptoms, the superficial layer [of issues]. I don't think they're interested in going deep because when you do go deep, then you get into really serious politics. […] And I think [they] want to keep their spot, so they tend to just address these [issues] superficially. (pg. 3)

Participants highlighted that engaging in deep reflection allowed them to see the overall picture, the need for change in personal or organizational areas, identify possible courses of action, and address the root causes of issues thoughtfully. As one of the primary themes of this study was related to contextuality of leadership, it seemed that experiences gathered in various roles or organizations were helpful to leaders throughout their careers. This is not to say that leadership approaches are fully transferable between similar roles or organizations. However, as it is exemplified in later sections of this chapter, a good understanding of the organizational context and the ability to draw from past approaches that worked or did not work when implemented were often considered beneficial. Zachary's perspective, for example, was *"heavily informed by other's leadership styles and my experiences with them" (pg. 2)*. It was important that leaders have what Noah called "*a toolkit of those various types of leadership that I could draw on […] as needed" (pg. 12).* For many participants, leadership evolved with every new experience. The process itself, as well as specific examples, are provided later in this chapter.

It seemed that organizational culture and view of leadership also had an impact on how participants conceptualized leadership. Those who worked in more than one

sector, organization, or type of job emphasized that their diverse experiences added complexity to their perspective of leadership. Often, leadership crossed team or organizational boundaries, also involving community partnerships. Some important considerations in developing meaningful relationships with community partners mentioned by participants were trust and honesty (Spike), responsiveness and authenticity (Maril, Zachary), big dreams and innovation (Mercedes, Emma), co-creating a vision for future (Margaret), and strategy (Noah). Nevertheless, although some foundational skills were transferrable, for participants in this study, the transition between sectors seemed to be somewhat difficult and rather lengthy. This is an important facet of leadership and is discussed in detail as part of the leadership implementation section. It is noteworthy to mention it here, though, as the context in which participants either developed, observed, or implemented their leadership informed how they perceived the phenomenon and approached leadership practices.

Another observation I made in the interviews was that past experiences gave direction to people's careers. For example, Hope's experience as a non-traditional student motivated her to dedicate her career to finding leadership opportunities where she could look *"at ways to create more access to everyone, but particularly for students who are underrepresented" (pg. 6).* As well, Ernest's past experiences initiated a pathway for his career endeavours and helped him develop empathy in working with people that had similar career experiences. Additionally, Mercedes' experience with bad leadership was the crossroad that motivated her to undertake career change and focus on addressing some of the systemic barriers within education. Finally, Avery's leadership was informed by his upbringing and his family's focus on addressing issues of social justice by allowing him to recognize oppression and strive to attend to it.

Summary: What Informs Participant's Perspective of Leadership

Leadership is a multilayered phenomenon. Participant perspectives of leadership were grounded in a wide range of lessons learned from their past experiences in different aspects of life. Also, they learned from and modeled others who served as mentors or role models, in addition to what they drew from their education and leadership theory and research. Past work and volunteer experiences and organizations they worked in influenced how participants perceived and practiced leadership, too. The many facets described by participants indicated that aspects of leadership pervade all

aspects of life. Understanding what informed the leadership of participants was vital in constructing a broad view of how leadership is conceptualized in this study. Building on this understanding, the next subsection confers findings related to how participants perceived their own leadership as it emerged from analyzing their stories.

4.3.2. Perception of Own Leadership

This subsection illustrates how participants perceived their own approach and focus of leadership, the way they described these and some general strategies they used in implementing leadership. The subsection aims to add another layer to grasping participant perspectives of leadership, which would be valuable in understanding the phenomenon of leadership as it emerged from the data collected for this study.

Leadership Approach

Participants acknowledged that leadership emerged both formally and informally, but they also recognized that leadership was generally associated with formal leadership roles. There was a wide range of terminology used by participants to describe their own approach to leadership, drawn from either practice or theory. For instance, they used everyday language such as decent (Johnny, Jesse), approachable (Timothy), reasonable (Spike), strong (Earnest, Jesse), or task-oriented (Maril, Shirley) to describe how they perceived themselves as leaders. Alternatively, deriving from established leadership theories, participants thought of their leadership as being pragmatic (Margaret, Joy), adaptive (Maril), person-centred (Maggie), servant (Alex), strength-based (Timothy), or collaborative and participative (Sunny, Zachary). The same dichotomy was found when participants described their styles in formal leadership roles like leading *"from the middle … alongside [others]" (Amber, pg. 2)*, or *"quietly, on the side, behind" (Avery, pg. 5),* as well as situational (Maggie), distributed (Margaret), or accidental (Joy). Considering the multiple facets of his role, Noah perceived himself as an educator, leader, and mentor within and outside his organization. Maril also described her leadership as *"mindful of community change" (pg. 9)*. On a broader spectrum, three participants directly referred to their leadership approach as framed within the social constructivism, appreciative inquiry, or communicative action realms.

Most participants strived for or sought a consultative and participative leadership approach and some of them stated they were leading by example or with a question, or

more specifically, by invitation (Mercedes, Maggie), democratically (Spike), consultative (Sunny, Zachary), and ethically (Alex, Johnny). They considered "the team" as one of the best work environments because leadership could be exercised by many. Ernest, Johnny, and Maggie emphasized the importance of relationship development in their approach while Shirley and Maril thought of their leadership as being focused more on tasks or actions. A key lesson for Noah was that strategy was critical in leadership as *"it's one thing to have this great vision, but it's delusion if you can't execute it" (Noah, pg. 8).* Several participants acknowledged the fact that everyone had an important role to play within a system and perceived organizations as interconnected webs. Along these lines, Timothy stated that all roles were needed within a team and that

> … some of the roles are not necessarily more complex, but maybe more abstract than others. Others are more hands-on. But everybody—and that's an ideal situation—has respect for the other roles, as well as the other positions that people are in. (pg. 6)

These examples showcased that participants in this study did not favor top-down models of leadership and they strived to promote collaboration and value of people's expertise and experiences regardless of their role in the organization. Sunny shared some leadership strategies that others perceived as effective upon completion of a successful process*: "you were so effective in this [process] because you told people why it was important, you asked them how you want them to participate, [and] how they could add value" (pg. 10, 11).* As a more general approach, Spike described his leadership as transparent and inclusive, focusing on the issues, processes, motivating others, and the goals to be achieved. More specific stories that participants shared with me related to their leadership approach are illustrated in the leadership implementation section.

Looking closely at the stories that participants shared, even though it became clear in conversations that participants considered leadership as emerging in both formal and informal roles, several participants did not think of themselves as leaders because they were not in commonly deemed formal leadership roles. Acknowledging that at times, leadership emerged in their roles, too, Victoria saw herself as an innovator, an inspirer, and an agent of change, Jake as focusing on ideas and innovation, and Emma as connecting people and resources. When talking about what opened doors to leadership opportunities, Joy mentioned her being resourceful and focused on the future and Hannah emphasized her decisiveness in time-sensitive situations, viewing herself as an advocate and *"the kind of person where I would rather go down with the ship*

knowing I did the right thing than live with not doing the right thing" (Hannah, pg. 22).

This last quote extracted from Hannah's interview shows that risk-taking is part of leadership. Often, participants noted that taking risks in leadership was not for everyone. While Hannah and Johnny shared experiences about the negative consequences of leaders' not acting on issues, several other participants talked about risk taking as an essential part of senior administration roles. Hence, taking risks was apparent in both formal and informal leadership. Many participants also considered authenticity as central to approaching leadership. Timothy's comments though, show that sometimes, being authentic posed a certain risk to leaders:

> I could not be this type of leader that is always politically correct and holding back on the real feelings just because it's a bit of an easier ride this way. I could not look myself in the mirror in the morning and say 'Yeah… Okay, I pretended yesterday I didn't know, when I actually did know'. I'm always good for an opinion, let's put it this way [and this] sometimes, creates trouble. (pg. 6)

Leadership Focus

The focal point of participants' leadership varied, often depending on the role, situation, or organizational context. Nevertheless, the consensus was that leadership was primarily concerned with people and relationship development. It was about their development as leaders and their involvement in others' growth. When considering organizations to work in, in general, participants would look at how their own values and perspectives aligned with the organizational values. They preferred variety and challenges in their work, finding them intellectually stimulating and sources of motivation. The emphasis on building culture within and outside the organization and developing strong relationships with stakeholders was also prevalent in participants' stories. So were fostering credibility and trust in relationships, setting reasonable expectations in working with others, offering support, feedback, and resources to help them fulfill their responsibilities and grow. In the growth process, accountability was mentioned consistently. Johnny referred several times to mentoring new instructors in his department and providing feedback as being conducive to professional growth because teaching had become more complex over time and was now *"a more challenging job than a lot of people would assume. You don't just go in the classroom and teach. There are issues that you need to deal with" (Johnny, pg. 6).* Thus, mentorship ensured high standards of teaching and learning.

Another central point in the dataset was the prevalent connection between leadership and continuous learning. This connection and the different facets of learning are detailed later in this chapter, yet because it emerged as a focus of leadership, it is worth mentioning it here, too. For example, Johnny considered himself still a "junior" leader and learning even though he had been in a formal leadership role for an extended period of time. Perhaps, for him and others, this perception was related to the changing landscape of education, which added complexity to their leadership roles and might prevent one from perceiving themselves as "experts" in their area. Many participants highlighted the role of self-reflection as providing them with the opportunity to assess problem-solving and decision-making skills in unfamiliar situations and *"the ability to recognize where I'm at and how that's important to the process" (Shirley, pg. 3).* But those who entered a different role or organization recently felt they needed to familiarize themselves with the specifics of the job and the environment, hence learning was an essential part of their new journey. More details and examples that exhibit continuous learning as essential to leadership may be found in the leadership development section.

What I also found in looking at how participants perceived their own leadership focus was the dilemma in what weighed more or was of more value to leaders and organizations: people or organizational development? If both, then, how could a leader balance them? For example, Avery considered his "traditional old style" that focused on direct interactions with people to offer encouragement valuable and Maggie shared examples of teams that suffered when leader's responsibilities focused on large-scale projects at the expense of people and relationships. In a world where technology wins ground rapidly or leaders' workloads are increasing, human interaction and relationship development might suffer, and people seemed to be "*craving face time with their boss and they don't get it because there's no time left" (Ernest, pg. 18).* Responding to competing demands may be challenging even for competent leaders and may affect teams, organizations, or even result in personnel turnover. In contrast, when talking about personnel recruitment and retention, Maril highlighted the continuous effort in her organization to provide people with opportunities for growth in line with their skills and passions. More details about these findings are provided in the subsequent sections of this chapter.

Summary: Perception of Own Leadership

Participants shared how they viewed their own leadership approach and what they focused on at some point in the interview. This theme showcased that participants brought to their leadership approach a variety of experiences from their personal and professional lives. Leadership was deemed contextual, mainly focusing on people and relationship development, and was associated with lifelong learning that occurred in formal or informal settings. Participants in this study generally strived to approach leadership from a collaborative lens, acknowledging the different roles and perspectives that people brought to formal positions, or informal roles taken in completing goals.

4.3.3. Defining Leadership

This section presents findings that are related to how participants perceived what leadership was or was not. The two subsections included here provide an overview of how leadership was conceptualized and described by participants. The terms "leader" and "leadership" were often used interchangeably, hence the use of the term "leader(ship)" in portraying leadership.

Leadership Is…

Conceptualization

In general, participants in this study used the terms *leadership* and *leader* interchangeably. Several clearly distinguished between the terms at some point during their interview and associated *leader* with the individual and *leadership* with the process or action that an individual took in a certain situation. When discussing what leadership was, participants described it using words like complex, nexus, situational, strength-based, inspirational, relational, strategic, aspirational, or visionary. There seemed to be agreement that leadership emerged both formally and informally. Also, leadership was a lengthy process for at least two reasons. Firstly, leadership largely referred to developing relationships and creating a *"strong bond with your people" (Ernest, pg. 5)* and developing great relationships took time. *"You have to understand your people. That's huge!", Mercedes (pg. 14)* said. Secondly, leadership involved change, which was often complex and implementing change required an extensive period of time.

Participants also compared leadership to teaching or service. For them, leadership was a "selfless journey" because even their own leadership development was about benefiting others. Leadership involved influencing others by recognizing their potential even when it did not seem obvious, seeing possibilities where people could be successful, empowering and supporting them in their actions, offering guidance in solving dilemmas of what to do next, and creating opportunities for development and career advancement. A leader needed to make space for career conversations in a trusting environment to allow others to develop their leadership, too.

But leadership was more than that. It inspired the *"envisioning together" (Mercedes, pg. 17), "motivating and engaging people and teams" (Joy, pg. 5),* and finding ways to complement one another while "working together". For Hannah, leadership took place within a context, at a given time, and involved people who may or may not be privy to "face-time". For her, leadership did not reside in one person, but in a community driven by a cause or agenda. The leader then became a representative of the community, taking on the responsibility for moving the agenda forward. Also, Maggie considered that a leader did not necessarily need to have a vision and in fact, it was more important to lead others through the process of creating a shared vision. Lastly, Jesse used Machiavelli's model of the Benevolent Dictator to describe a facet of the School District hierarchy, also stating that "*It's a very fine-tuned thing to be able to be a person who has the charisma and the ability to motivate people yet have the humility to have people follow you without thinking that you're arrogant and demanding" (pg. 14)*.

Leadership was also perceived as contextual and situational, involving understanding an issue and adapting to it, recognizing stagnation and the need for change in a context, and looking for ways to involve others in change processes. For example, a leader in a School District needed to be "*able to move the teachers, and to move your leadership staff, and to move your students in a way that is positive for them … [It is] the key!" (Jesse, pg. 4).* Jesse emphasized several times in his interview how important it was that leaders in K-12 understand how hierarchy worked in the system. In his view, a "good" leader was a "strong" leader who had district vision and was able to establish and develop relationships with stakeholders. Amber also stressed the value of leadership education and experience for those working at district level. While K-12 hierarchy was acknowledged throughout the interviews and evident in the practice of

participants who worked in the sector, the PSE structure seemed flatter. Mercedes stated that in fact,

> this hierarchy [in K-12] is crazy! Come to higher ed because there's more. But I perceive it in my mind, which I think, it's kind of fun, as flat. I see it as flat, I see it as all interconnected and we're all doing a type of job that is trying to head towards this common goal. (pg. 18)

Others also made direct references to the perceived flat hierarchy in PSE. Perhaps, the collegial approach in this sector and the focus on expertise rather than formal title made the hierarchical levels less visible. Emma described collegiality as a structure where *"everybody has that opportunity to voice their opinion, everybody participates in reaching a decision, everybody participates in the debate before that" (pg. 2).* Nevertheless, Jesse considered collegiality as unrealistic in an inherently hierarchical education system. Others also commented on the downsides of consensus-building approach in PSE when the process was not managed appropriately, resulting in "more talking" and paralyzing action. Therefore, a leader's responsibility was not only to encourage participation and consensus, but to manage the process and know when to move forward in decisions.

Moreover, leadership was about continuous learning, developing skills, competencies, and expertise to match the situation and issues occurring in practice. It was a leader's role to create a trusting environment conducive to learning and discern the timing when to engage people in *"conversations that matter" (Maggie, pg. 6).* In this learning process, several participants commented on how important it was for leaders to be comfortable with showing vulnerability, acknowledging that they did not know everything, and asking for help when needed. To *"help make wherever you're leading the best it can possibly be" (Amber, pg. 2),* many participants shared that they relied on experts or available literature in the field and looked broadly for solutions. Participants also defined leadership as interaction with different perspectives, influence, working together, building other leaders, motivating others, recognizing the spheres of control and levers, and hard work. Several quotes extracted from interviews that reflect these definitions are presented below:

> true leadership for me is this interaction with frameworks and constructs and that really leads, in my opinion, to a much more substantial and fundamental change in personality because you suddenly see things differently. (Timothy, pg. 21)

influencing people's beliefs and opinions through actions and evidence. (Joy, pg. 6)

leadership is working together with others to create a vision for the future; working together to achieve that and continually gathering perspectives along the way through the progress that we're making, so that we're all working together. (Margaret, pg. 8)

evidence of good leadership whether for myself or for others is that people are coming. People are drawn to it. That's a measurable outcome. In the end, … when you think about leadership, you think about that you're trying to build leaders. Your legacies are other leaders, building them up. That's to me where I find was good leadership. (Mercedes, pg. 5,6)

true leadership … is how can you motivate people? Whether it's students in the class, the staff you work with, depending on what role you have … how do you motivate people to be their best self and do their very best? (Jesse, pg. 19)

Leadership is also about recognizing what your spheres of control are and levers you have to lead [and] what you don't have. (Noah, pg. 17)

and sometimes I think what's key ... is that leadership is really about rolling up your sleeves and get dirty … as well as learning to salvage what you do have and start … again, from scratch. (Hannah, pg. 7)

Hence, for participants in this study, leadership was not only about people and relationships, but about influence and meaningful change. For Jesse, leadership was *"a world of irony, a paradox, really" (pg. 15)*. Timothy referred to leadership as *"a tricky word because it comes in various subsets" (pg. 9)*. Leadership entailed willingness to continuously learn, adapt, and fine-tune the approach. Specifically, Avery mentioned the "three guideposts of good leadership" as good communication, mutual support, and developing positive relationships, with the latter being "*the heart of good leadership" (pg. 5)*. Maril perceived leadership as having broader impact, being "*beyond interactional" (pg. 11)* in organizations and involving communities, as well. Maggie saw leadership as *"bringing about change with a moral purpose with others and bringing others into that change process" (pg.9).* When referring to leaders, in general, Amber thought they were *"entrusted with others and what their aspirations and hopes are" (pg. 2).* Hannah highlighted how for people to want to engage, they looked for a leader who *"reflect[ed] them and their ideals" (pg. 32).* Margaret considered that *"the most important thing that leaders can do is create that culture, that environment that will allow all voices to be heard and all people to participate" (pg. 9).* Zachary described an effective leader as

"someone who collaborates, someone who motivates, someone who inspires, and someone who empowers others [by] cultivating curiosity and soliciting input" (pg. 2).

In interviews, participants identified and defined or described various types of leaders or leadership, perceiving them either as complementary or as progression in their leadership development. For example, Timothy differentiated between two types of leaders who were often found in senior leadership roles—"inspiring" and "impressive". The first combined enthusiasm with vision yet needed to prioritize these ideas and identify resources to help implement them. The second seemed "just perfect in every situation", but they had no vision and so, they were primarily focused on maintaining the status quo. In light of these, there seemed to be a need for a balance in leadership teams to allow for both stability and innovation, or the need for a leader to differentiate between the times that called for innovation and those that called for stability.

Noah and Sunny focused our conversation on specific examples associated with a type of leadership that was influential in informing their own leadership. Noah described five leaders and how they influenced his leadership: "visionary", exercised by a leader who offered mentorship, support, and *"cared about people and about things. They cared about making it happen, but doing the right thing, too" (pg. 6);* "task-oriented", exercised by a leader who was focused on goals and how to achieve them rather than relationships; "shared", based on trust, exercised as "for me and with me", and inspiring "supreme confidence"; "aspirational", which meant asking the question "what's your next step?", which lead to action and change; and "strategic", which focused on *"how to accomplish audacious things, which people thought perhaps couldn't be done" (pg. 11).* Noah perceived these leadership approaches as complementary as well as progressive. He highlighted that he learned something different from each of these approaches and saw his own leadership evolving from instrumental to higher-purpose leadership. Similarly, Sunny saw his leadership as evolving from directing someone "to get things done", to "working to influence", to a leadership style that was grounded in participation, consultation, and purposeful conversations. The former conceptualizations are described more in the leadership development section as they relate to student or early career leadership.

Portraying "Good Leader(ship)"

When asked to "best define what leadership is", participants often referred to or described leadership experiences with leadership as "good" and portrayed leadership using a range of characteristics, behaviours, actions, or outcomes that denoted the positive side of leadership. This section presents findings related to how participants defined and understood "good leader(ship)" with regard to terminology, activities, outcomes, and constraints.

When analyzing the data, in an attempt to describe what good leadership was from participants' perspective, I faced a challenge. There seemed to be as many portraits as participants. Some described someone they worked or interacted with while others kept the conversation more general. The list of "good leader(ship)" characteristics is a long one, and it would be unrealistic to expect any one person to possess or manifest them all. But thinking about how participants described leadership as an evolving process and being *"about learning and listening" (Mercedes, pg. 13)*, one might hope to change over time and reach a stage where leadership becomes *"really settled" (Sunny, pg. 8)*. For example, participants referred to a good leader as strong, capable, tactful, extraordinary, true, collaborative, effective, or inspirational. Good leaders were also adaptive, empowering, patient, reflective, curious, and vulnerable. A good leader was one who "people wanted to follow", created pathways, valued diversity, "stood with the crowd", and was constantly listening. Some words used to describe good leadership were service, shared vision, situational, respectful, and empathetic. Looking closer at the above lists of terms, it may be observed that most are common words or phrases, but some are more established terminology. This observation might indicate the two facets or leadership—theory and practice—and the diversity of views in defining leadership. Certainly, there were numerous other ways that participants used to describe "good leader(ship)", which I use throughout this chapter to add depth to the presentation of findings.

Many participants acknowledged that because leadership approaches were shaped by the context, a leader's capacity to be fluid and adaptive within ethical boundaries was essential. Participants also highlighted a leader's authenticity, as well as leadership entailing taking risks, having the difficult conversations, and walking "the tough walk". In these types of situations, several participants brought up the need for

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courage, mutual trust, transparency, and respect. As Alex stated, *"if you don't have that [transparency and respect], you can't lead" (pg. 2)*. All participants mentioned at some point in their interview how important it was for leaders to engage others in dialogue and value their talents and opinions. Zachary added not making positional power visible and bestowing trust upon others in taking on informal leadership roles. Approachability and a sense of humour were considered assets to leadership.

Participants often emphasized the value of engaging different views in leadership dialogue to achieve the best result. When talking specifically about diversity of opinions in academic settings, Zachary said that a leader needed

> to realize that when you have a team of academics, a team of very talented, intelligent people, you're going to have disagreements, and that's okay. And to be a leader means also to cultivate an environment where disagreements are encouraged in a respectful way. (pg. 3)

Maggie also saw value in engaging conflict rather than managing it because this approach allowed for conveying views that would not be shared otherwise. In fact, Timothy stated that "*good leadership asks people to question it" (pg. 31).* Finally, when discussing tough decisions and change, Alex thought leadership was about *"having people trust your judgment and bringing them along with you even if it's going to be a negative change" (pg. 5).*

Another aspect that emerged from the data was that although the leader needed to be adaptable and willing to and "*capable of doing it all… and doing it well" (Ernest, pg. 17, 18),* the value did not rest in the leader's being always present and involved in all tasks or decisions to reach the common goal. The most valuable aspect appeared to be given by the leaders' ability to step back and let others contribute once the vision was "painted". In a sense, the leader's responsibility was to be consultative and gather perspectives from all stakeholders, surround themselves with people who could do the work and equip them to do the work, anticipate or notice potential questions, and create space for them to complete the work shaped by the vision. The interview quotes below show leaders having discernment in when to step back and allow others to engage and contribute to the process:

> It really is about setting goals, setting strategy with people and then letting people go and do whatever needs to get done in order to achieve those strategies. (Emma, pg. 5)

> you find good [capable] people and you set a vision and you give them what they need and off they go. (Hope, pg. 20)

> that's what good leaders do: they recognize their gaps and they hire or surround themselves with people that help fill those gaps, and are honest with them, and are authentic with them. (Hannah pg. 4)

> recruiting or being around the best people you can possibly be to move your vision and mission forward. (Joy, pg. 6)

> leadership within various roles [is] more about the ability to, I guess, to inspire other people to be collaborative, and to empower other people to take the vision in another direction. Or to be able to work with it within their own capacity, whatever that might be […] To get out of the way and let other people do what they need to do. (Victoria, pg. 4)

> make space for [people] and to make them aware that there's much more to learn and it's doable. But it takes time. (Jake, pg. 21)

Maggie brought up an important point that could contribute or hinder collaboration—that of infrastructure. In her view,

> the more perspectives that we have, the richer our workplace will be, provided we create the infrastructure that allows that perspective to emerge and be voiced. It's no point in having it if we're not inviting people to share their view. So, creating those spaces, I think, is important as a leader. (pg. 5)

When Hannah considered how people connected with their leaders, she commented on the value of being open about own vulnerabilities:

> I admire that because I think a lot of people want to position a leader or leadership as this infallible rock, or stone, and that's what people gravitate towards. Maybe in, like, the 15th Century! But, I think, nowadays, we tend to gravitate towards people who are open and honest about their failures and weaknesses and gaps and their struggles... And so, it makes them more personable. It makes them more like me-type of attitude. (pg. 31, 32)

In contrast, Timothy described a type of leaders

> who appear to the outside extremely headstrong and extremely sorted out and determined, and internally, they're actually very timid and there's a lot of trepidation to do something […] They do not want to step on anybody's toes and it's really more about avoiding conflict. (pg. 10)

Considering other similar examples that participants like Hannah, Joy, and Shirley provided, this behaviour might mask a lack of confidence or be rooted in unhealthy

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views, expectations, and stereotypes about leadership promoted by organizations or society, in general.

In terms of outcomes of such leadership approaches, participants mentioned strong decision-making, courage in advocating for others, and resourcefulness. As Jake stated, *"a leader's work is never done" (pg. 22).* In fact, *"people determine who they follow and who they support" (Hannah, pg. 37)* and *"a leader is only as good as the people they can support to lead" (Maggie, pg. 22).* Like Mercedes stated, bringing people together and helping others became leaders themselves were appropriate measures of "good leader(ship)" success.

Overall, participants portrayed good leaders based on their own experiences as leaders or with others' leadership. As seen earlier in this chapter, participants learned from different approaches to leadership and were influenced by multiple people. Although these experiences were different in nature and drawn from various contexts, their ideas could be summarized using Emma's description:

> a good leader is one who coaches their staff, mentors their staff, guides their staff, is there to answer questions, facilitates group activity for the best possible outcome […] A good leader is really someone who people want to follow, and they can really manage whatever it is that's going on and not freak out […] A good leader thinks on the spot. (pg. 3, 4)

"Good leader(ship)" is not only about intentions, but actions. However, there seemed to be some constraints to exercising good leadership emerging from participants' stories such as inappropriate resourcing, adverse organizational or systemic politics, dispersed organizational structures, and lack of organizational distinctiveness. Also, non-cooperative leaders or personalities that did not fit well together seemed to hinder good leadership. Some of these constraints are expanded on later in this dissertation, when I present leadership struggles. Nevertheless, as many of these constraints are outside of a leader's control, there was a general sense of one's having to recognize that "there's so much they can do" albeit not before attempting to address these challenges.

This section provided some insight in what participants perceived leadership to be and some examples of what "good leader(ship)" was. These insights are useful in better understanding the development and implementation of leadership that this chapter focuses on later. Looking closer at this section, it appears that taken by itself, the section could provide a picture of what leadership is or should be. More specific examples of

characteristics, behaviours, actions, and outcomes that fit within the positive side of leadership are presented as they pertain to leadership development and implementation. I now turn to the opposite: what participants thought leadership was not.

Leadership Isn't…

Conceptualization

In general, when talking about what leadership was not, participants contrasted with what they considered leadership to be. For example, Zachary contrasted "We-centric" to "I-centric" approaches and commented that *"it's not just my show here, it shouldn't be. Everyone has an equal role" (pg. 5).* In addition, Timothy contrasted "inspiring" and "impressive" leaders in describing good and bad leadership, the latter often having *"fantastic stage presence … but no vision" (pg. 35).* He also perceived political leadership to be the most concerning type of leadership because it was often exhibited as role-playing rather than genuine. When defining "true" leadership, Jesse said that *"it's not the chain, it's not the ladder, it's not the titles. It's not any of those things!" (pg. 19).* Hannah highlighted a leader's need to take action, especially in crisis situations, adding that sometimes, "*you don't see [taking action] in administration at all! In fact, people get caught up in the bureaucracy and the red tape and they feel helpless*" (pg. 7).

When describing what leadership was not, participants used words and phrases such as arrogant, demanding, myopic, self-promoting, disrespectful, oppressive, micromanaging, and terrible. Leaders falling into this category seemed to take advantage of their positional authority, show favouritism, deflect conflict or avoid problems, and take credit for other's work. Top-down and command-and-control approaches were perceived as unproductive and stressful because it forced people to do something that prevented them from being and doing their best. Amber emphasized that leaders *"will not get to their [followers'] heart by being top-down. There's no place in most institutions, I believe, for top-down leadership" (pg. 5).* In response to top-down approaches, people would respond by either complying or bracketing, without really changing: *"people are really good at, I think, nodding and bobbing, if they're required to do so. But that doesn't mean necessarily that they're going to do that." (Amber, pg. 5).* Along those lines, Timothy shared the concerning outcome of telling someone that their "thinking was not right", adding that *"what the person might do is then bracket those*

thoughts, but you're not really changing the person. It becomes a little bit more of a shell that you're suddenly interacting with" (Timothy, pg. 21). Instead, "*people like to be invited" (Maggie, pg. 9)* and many participants shared stories about positive outcomes when others were invited to conversations. Especially when leadership was exercised in community partnerships or when working with marginalized populations, an authoritarian, hierarchical approach appeared inappropriate and possibly, could have the reverse effect. The analysis of these stories and the outcomes of such approaches presented here are discussed more in depth in the subsequent sections of this chapter.

An interesting finding was that participants often referred to *management* as not being leadership or as a part of the "old paradigm". Although management and leadership were considered interrelated and essential in all formal leadership positions, management was often associated with top-down models, which were deemed not suitable to education. I found Emma's contrasting the two concepts insightful:

> [A manager is] somebody who is very directive and they're behind the screen and have no idea what their blue-collar workers are doing [...] A manager is somebody who you're afraid of, a leader is somebody you want to follow, you want their guidance, you want to work with them [...] I think being called a manager would be very insulting for most leaders. (pg. 8)

For participants in this study, the difference between what leadership was and was not seemed clear. From analyzing their stories, it looked like being aware of negative aspects of leadership helped them become better leaders. The next subsection presents a span of such examples of "bad leader(ship)", which adds depth to what leadership was not in the participants' perspectives.

Portraying "Bad Leader(ship)"

When participants were asked to "best define what leadership is not", they often referred to or described their leadership experiences as "bad". This section presents findings related to how participants defined and understood "bad leader(ship)" with reference to terminology, characteristics, activities, and outcomes. Several participants mentioned that bad leaders, in general, were in leadership for the wrong reasons. Avery went further and commented that "*they're going about it the wrong way, or they're trying to be leaders in the wrong way. They're either disrespectful, dismissive of a junior person's voice, or self-promoting. It shows very quickly, and I struggle with that" (pg. 8).*

"Bad leader(ship)" was described by participants as authoritative, egocentric, stereotypical, *"loud, noisy, in your face" (Joy, pg. 10),* with a *"focus on trivial little things" (Shirley, pg. 15), "just a show" (Timothy, pg.34)* or *"just [one's] show (multiple participants).* Ernest described such a leader as verbally abusive, incapable of executing strategies, and having unrealistic expectations; Hannah, as someone who *"fails to observe and listen to what is happening" (pg. 21);* Timothy, as one who wanted *"to be part of the solution [for the sole reason] to look good" (pg. 14)*; and Victoria, as someone *managing* people rather than *leading* them. It seemed that these leaders tended to hire people who shared their own views or inexperienced people who they "*could mentor, and mould, and shape, and never outshine [them]" (Shirley, pg. 7),* sometimes without much regard of others' personal values, beliefs, or aspirations. They were leaders who demanded compliance, did not expect to be challenged, and were "outraged" when they were. Often, asking for compliance was coupled with one's arrogance, limited vision, lack of understanding the context, or lack of awareness of what was happening in the organization. Such formal leaders seemed to "dictate people what to do" rather than lead them toward reaching a meaningful goal. Emma referred to such leadership approaches as *"something that I don't want above me. And I'm saying 'above' because these leaders tend to think that they're above you" (pg. 11).* This linked bad leadership to hierarchical models. When referring to a middle-management experience from his corporate days, Sunny commented: *"I found that was a very conflicted role for me to work under [i.e., senior corporate leadership] and try to sell them to people who worked for me. So, it was not a good place for me" (pg. 9).* In participants' experiences, bad leadership approaches resulted in low morale, absenteeism, lack of engagement, and turnover.

Participants reflected on the actions that distinguished "bad leader(ship)" from "good leader(ship)". Many of them mentioned personal agendas or wrong intentions, and "forcing people to do things". Shirley added punishing or isolating those who disagreed, and Johnny, lack of action on issues affecting the work and the morale of the team. Poor decision-making processes were associated with dishonesty, conceit, and abuse of power. The perception that one "had all the answers", an either-or perspective, and a "false sense of urgency" were considered detrimental, as well. When experiencing bad leadership, participants found it appalling. They described how they felt when decisions were made based on assumptions and without consultation, when they were given a to-do list with the expectation of completing it without support or guidance and were

punished if it was not "done right". The environment created by such approaches to leadership was described as threatening, toxic, isolating, and not at all conducive to teamwork, collaboration, and growth. Two relevant examples from education where such an environment existed were:

> I was shocked because I was observing everything that wasn't 'team' to me: people stabbing each other in the back, people locking their office doors when they left work, people coming in late, people not leading by example… It was a very toxic environment. It was shocking! I was actually quite offended that they were using the word 'team'. (Ernest, pg. 5)

> I have seen leaders who use the word 'team', but really, it's their show. They say it a lot, they pretend to ask for input, but really, it's their show. People pick up on that in a heartbeat. (Hope, pg. 23)

Participants shared many stories of "bad leader(ship)" and emphasized that whenever possible, they would choose not to work in organizations where this leadership was exercised or with people practicing this type of leadership. Participants also highlighted harmful outcomes of such leadership approaches—hindering progress, creating a "them vs. us" culture, and inflicting fear. As well, experiencing this leadership was disheartening and disempowering for people. They felt stifled, stuck, or limited in what they could do, resulting in stress, frustration, uncertainty, and even anger. Moreover, when faced with leaders' impatience, misbehaviour, or unrealistic expectations, followers became afraid to make decisions, feeling incompetent at times, or that they were *"doing something wrong" (Mercedes, pg. 8).* Eventually, they would disengage or leave the organization. But some participants shared their attempts to help leaders who exhibited aspects of bad leadership by providing feedback and guidance, hoping that these leaders would change. Avery went further and described his approach as follows:

> I generally don't go right at them, but quietly find ways to mitigate that approach. Because I don't think that's the right way to leadership. It's not a way to establish followers; it's not a way to make change by being dictatorial or by forcing change or directing people to undertake tasks. (Avery, pg. 8,9)

This section is not meant to encompass all aspects of "bad leader(ship)" or what leadership is not in the participants' perspectives. However, the range of experiences with and outcomes of such approaches presented in this section are useful in understanding more specific examples provided later in this chapter, particularly in the section related to struggles in leadership implementation.

Summary: Defining Leadership

When looking at how participants described what leadership was or was not, I found the diversity fascinating. Compared to older paradigms where leadership often resided in a singular position of formal leadership, leadership was conceptualized by participants in this study also as emerging in collaborative processes and often focusing on the expertise that one could contribute to achieving goals. In this sense, leadership became more complex and involved more than one individual in a formal role. This change reflects the transition from "I-centric" to "We-centric" approaches of leadership. For participants, leadership was mainly concerned with people and relationships, learning and development, as well as the context where leadership took place. This section contrasted a series of "good" and "bad" leader(ship) approaches, showing the positive effects of the former and the negative effects of the latter on people or organizations. Although not exhaustive, it offers specific examples of actions and outcomes, helping with the understanding of how participants conceptualized leadership and how this conceptualization may form the basis of their practice.

4.3.4. Section Summary: Overall Perspective of Leadership

Exploring participants' overall perspectives of leadership helped me contextualize their experiences and better understand how they developed their leadership and how they approached leadership in practice. Personal, educational, and work or volunteer related experiences played a major role in participants' conceptualization of leadership. Participants also talked about their leadership being informed by social and cultural experiences. Additionally, they highlighted their emulating "excellent" leaders, as well as learning what not to do from "terrible" leaders they interacted with or observed. Their leadership was informed by various forms of education, often culminating with the Educational Doctorate in Leadership, which influenced their leadership by creating awareness of theory and research and providing opportunities for dialogue and deep investigation of leadership issues.

In defining and describing the leadership phenomenon, participants used a variety of concepts drawn from everyday life or theory and research. In general, participants differentiated between leadership and other similar or overlapping concepts such as management. Leadership was seen as focusing on people and building

meaningful relationships, within which people could learn from one another, influence one another, and initiate change. Leadership was also associated with responsibility for people and organizational growth. In the context of education, leadership was perceived as closely related to teaching and service. Participants highlighted that "good leader(ship)" would express itself in helping others identify and grow their potential by providing guidance, support, and resources, and by creating opportunities for growth. In contrast, "bad leader(ship)" would appear as lack of support and guidance, entitlement and abuse of positional power, as well as motivation to preserve or advance one's own image. Understanding how participants defined leadership and what informed their perspectives was also useful in understanding how they developed and approached leadership in practice, which are the areas explored in the remainder of this chapter.

4.4. Leadership Development

Leadership development was another major area explored in this study. Participants developed their leadership primarily through their own experiences as leaders, followers, or observers of leadership; by engaging in various forms of education—formal, informal, and non-formal; and by interacting with others. In the interviews, they shared meaningful stories and memorable moments that influenced their leadership and contributed to their development as leaders. This section presents findings surfacing from analyzing these stories grouped in four themes related to leadership development as they emerged from the dataset: *Pathways to Formal Leadership, Learning "How to Be a Leader", Learning "About Leadership",* and *Learning "the Dialogue of Practice".*

4.4.1. Pathways to Formal Leadership

This subsection presents findings related to the first theme linked to leadership development. This theme includes the various pathways participants took to arrive at their current roles and how their conceptualization of leadership developed over the course of their career. Among participants, several were either retired or planned to retire within the next few years. Most of them completed their Educational Doctorate in Leadership in the latter part of their career. They either pursued post-retirement opportunities or indicated their willingness to do so upon retirement. Participants

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described K-12 career pathways as mostly linear, including predetermined milestones to formal leadership roles and little room for deviation. But in PSE, pathways were not as linear or predictive. Sometimes, roles identified by the same job titles differed in focus and responsibilities depending on the focus or the size of the organization. Namely, Hope referred to her career path as *"unorthodox"*, Jake as *"circuitous"* and *"eclectic",* and several others as *"complex".*

Stages of Development

From what participants shared with me, it seemed like there were somewhat different expectations of leadership depending on one's experience level. When talking about student leadership or their early career stages, participants referred to an "instrumental" understanding or exercise of leadership "in less sophisticated roles" (Sunny), which mainly focused on following instructions to complete tasks. Jake reflected on one major experience when he became aware of his instrumental approach to leadership, what some of the steps taken were, and how his approach changed over time. Emma also shared examples of leadership from her early career that were comparable to what some of her students were experiencing. These participants further commented on how learning and gaining leadership experience brought maturity in thought and action.

It appeared that it was the long-term exposure to and "interactions with philosophical frameworks and constructs" that brought on change in how participants perceived and exercised leadership because these gave them "*the opportunity to think things through at a much more fundamental level rather than just superficially" (Timothy, pg. 18).* Participants highlighted that some lay leadership books and short-term professional development opportunities targeting new leaders were designed more like "cooking recipes", presenting leadership as transactional or cause-effect. For example, Timothy described them as designed to "*point out situations, but they don't necessarily change your attitude and it becomes more like a conditioned response" (Timothy, pg. 16).* In this sense, Alex highlighted that he preferred the "academic perspective" of leadership as it seemed more suitable to his context and education, in general. However, Maggie argued that it was more important to understand why, for instance, leadership concepts and practices established in a specific sector were not suitable or transferable to another sector rather than disregarding them altogether.

To advance in their career, initiate change in their organizations, or make a difference in society, participants often pursued further education, culminating with the doctorate. "I needed a degree" or "I needed a doctorate" was often said in interviews. Some participants highlighted how life experiences helped them develop compassion for those who were going through similar trials and gave them courage to advocate for people or causes and seek ways to eliminate systemic or organizational barriers. Jesse discussed some of the tensions in seeking career advancement. As K-12 pathways to leadership were predetermined, in a sense, there was an inherent expectation to climb the ladder, without much deviation from traditional pathways and sometimes, without fully considering people's skillset and fit for specific formal leadership roles. Tensions were often related to aspirations *"to be more and risk of not doing good work" (Jesse, pg. 16).* Yet "the hardest tension" was being aware of one's capabilities and "*recognizing when you should stop ascending because 'this is all I really want', all the while doing this good work" (Jesse, pg. 18).* In his perspective, motivation was key and the ultimate goal of anyone's aspiring to leadership was to improve student learning in a place where one could have most impact, whatever that may be.

Transitions

Some participants transitioned between sectors and some of these transitions were lengthy and required dedication, grit, and continuous learning. Participants' transition to another sector was usually for reasons such as interest, *"looking for adventure [and seeking] progressive and diverse opportunities" (Noah, pg. 2, 3)*, finding better suited responsibilities, organizational changes or involuntary termination, post-retirement, or happenstance. *"I never imagined I would [work in the corporate sector]" (pg. 7),* Margaret said. Mercedes was in a new sector at the time of the interview and indicated she wished she had "read the signals" earlier that it was time to move on. Participants who transitioned between sectors seemed content with their decisions and argued that they used their past experiences in their current positions. Transitions between organizations in the same sector were mainly motivated by career advancement, lack of opportunities for growth, or negative experiences related to leadership in the existing role. For example, Sunny compared his experiences of educational and corporate leadership. Although in both sectors his approach was consultative and participative, leadership actions were not directly transferable between sectors and he recognized that the transition to PSE was *"a bit of a journey" (pg. 8).* It

"*was never really smooth*" (pg. 6), yet he persevered and was successful. Jake's transition to PSE was similar though he experienced more autonomy and in the long-term, he implemented significant changes in his organization. But he talked about his early days in PSE and the challenges he faced as a non-academic leader:

> I didn't really know much about being in the university. I was quite ignorant about how things worked. I found that everything I did I got push back from somebody. People would get outraged about different things. I didn't have any power, right? (Jake pg. 6)

Earnest transitioned from PSE to corporate and brought up the concept of "branding" and how being branded as an educational leader may prevent someone from entering corporate leadership. Margaret's transition to corporate was smoother and she mentioned that she used her learning and experience acquired in education extensively in her new role.

Transitions to senior administration in education involved a "decision to stay" in those roles. For example, Timothy *"wanted to try something else [other than teaching] and frankly, I never found my way back" (pg. 4);* Sunny wanted to explore the field of education; Spike was excited about the opportunity to build *"something from nothing" (pg. 2)*; and Shirley and Avery were eager to dive in various challenges associated to senior administration roles. This type of work seemed suitable for participants who were *"bored easily" (Timothy, pg. 4)* as it was complex and offered variety. However, the primary motivation came from the prospects to make a difference in the organization, field, and society. A couple other participants stated that although they had considered senior administration roles in education, they realized such roles would not be a good fit for them, hence they chose to pursue other leadership opportunities either in education or outside the field, where they could still use their learning and have an impact. A notable finding was that participants moving to senior administration referred to missing working with students and occasionally took on teaching opportunities, which were often in graduate programs in their area of expertise. Some either taught or planned to teach after retirement, as well.

When discussing what contributed to some of their transitions to new roles, organizations, or sectors, several participants mentioned specific events or how their initial career plan changed during or after completing their doctorate. Often these changes were prompted by challenges encountered related to socioeconomic or political

factors, organizational changes, and life events. Timing was an important factor, as well. For example, Noah transitioned out of K-12 when finding he was *"not really cut out for classroom teaching" (pg. 2)* and school schedule was limiting. Amber confirmed the latter stating that *"schools are very regimented. There's bells to start and stop things. You have to be there at certain times. There's flexibility in some areas, but there is also inflexibility within the system" (pg. 15).* Ernest was searching for a better fit with his skills, values, and perspectives. He found fulfilment in being able to work *"on things I really want to do" (Ernest, pg. 16)* and working with people who had similar goals and work ethics. For participants, transitioning to education was mainly motivated by its altruistic nature and perceived influence on students. When emphasizing the nature of altruistic work, Jesse said *"you can't aim [to climb the ladder in education for personal gain. It's like you] can't just work at a non-profit hoping to be the CEO of the non-profit. That makes no sense!" (pg. 17).* Along the same lines, Ernest implied that it could be hard for someone to leave education once they understood their role and impact that they could have on the life of others.

Challenges

Formal leadership roles are not easy. Participants in senior administration roles or those referring to such roles mentioned challenges such as leading large teams, managing large budgets, and dealing with human resources or union issues. In this sense, several participants stated that senior administrative roles in education do come with a great deal of transactional leadership and brought up specific tasks such as hiring, training new staff, managing projects, and completing paperwork. They also referred to difficulties encountered, at times, in dealing with the political aspects of these leadership roles. Other challenges participants referred to were long hours, stress, lack of life balance, and facing preconceived ideas that others had about administrators, in general. For instance, Hope stated *"being unhappy and burnt out" (pg. 38)* at times, Sunny that at some point in his career, he met with other's *"distrust of management" (pg. 16*), and Alex that *"even when you think you're acceding to people's wishes, they'll still find something [to complain about]" (pg. 8).* I heard "you can't please everyone" and "you can't control everything" many times during the interviews. However, it seemed that the impact participants could have in these roles offset these challenges to some extent.

While participants' leadership evolved with experience and reflecting on experience, challenges encountered in senior administration roles seemed daunting and detrimental as they often hindered reflection, which was considered critical for leaders:

> reflection is a huge piece of experiential learning and I think it's a downside of the huge and often impossible role that senior leaders take on. The workloads are ridiculous! […] You realize that you get so caught up in that business that you lose that time for reflection—that I think is critical for leaders. (Hope, pg. 36)

It also seemed that someone in formal leadership needed not only to be reflective, but also comfortable with their vulnerability in handling challenging situations. Along these lines, Hannah pointed out how she strived to develop empathy and new ways to connect with students by taking part in new learning opportunities *"to remember what it's like to start at the beginning [and be] vulnerable" (pg. 18).* This approach seemed transferable to leadership practices, as well.

Rewards

In talking with participants, I was amazed by their humbleness and passion to help others. They referred to their work as rewarding because it focused on supporting the growth of people and organizations. Like Avery said, leadership was about *"looking for ways to keep everyone moving forward and encourage people "(Avery, pg. 18).* Many others emphasized that they were not driven by titles or paycheques, and that their primary goal was to use their formal position to make a difference in others' lives, be them students, colleagues, or clients. In fact,

> …if [paycheques are] your driver or if the title of the position is your driver, I think, it's leaders like that people should run away from. That's not good and it happens very easily. Good people go into leadership… and Lord Acton was right, 'power [tends to] corrupt, and absolute power corrupts, absolutely'! Certainly not every leader, not by a long shot, but that potential is there. It is too easy as a leader to start to lose touch with your values when big shiny things are dangled in front of you. It's too easy to not have people around you who will tell you the truth, whether that's on a personal level or work. (Hope, pg. 26, 27)

Summary: Pathways to Formal Leadership

For many participants, leadership was an evolving process. They worked in multiple roles and organizations, some across multiple sectors or geographical areas. While career paths in K-12 were predetermined and often ascending, they were more

complex and non-linear in PSE or other sectors. Some participants who spent most of their careers within education found leadership outside an academic perspective as non-relevant to education or as more transactional. The challenges encountered in formal leadership were numerous. Although participants acknowledged these challenges, they also highlighted that their choice to pursue educational leadership was motivated by the change they could make for people and in people's lives.

Leadership comes inherently with challenges. Being able to acknowledge that one cannot know or do everything usually leads to wisdom of seeking advice and support from others. The remainder of this section presents in detail aspects of leadership development as they emerged from analyzing participants' stories, focusing on learning from gaining experience, through engaging in different forms of education, and from interactions with others.

4.4.2. Learning "How to Be a Leader"

This subsection presents findings related to relevant experience that shaped participants' leadership, the second theme related to leadership development. It begins by highlighting some positive and negative leadership experiences, followed by experiences with new leadership and trial and error approaches that participants took in addressing practical issues.

Positive and Negative Experiences

Participants highlighted that learning from experience played a major role in shaping their leadership. In interviews, they shared both positive and negative experiences and their impact on leadership. To begin with, Jake and Hope shared life changing experiences that provided lessons transferable to the professional realm. Also, what had "huge" impact on Hannah's leadership development was seeing and taking part in *"the acts of courage and bravery … being empathetic, and understanding the [crisis] situation, doing whatever you could to make a difference" (pg. 8).* Participants recognized that leadership involved both success and failure, sharing how celebrating success helped them build confidence and provided motivation to continue. But Noah was somewhat reserved on celebrating success even though he highlighted that he "worked hard" to achieve it:

for me, what I take pride in and what I like to do is lead in ways in which I can move organizations forward. Sometimes there are successes and sometimes there are challenges. Sometimes we win, sometimes we fail. Don't take too much credit for the wins and try not to personalize the losses. Not always easy. (Noah, pg. 17)

Although participants indicated that they learned something from all their experiences, the most impactful lessons were learned from negative experiences. The most salient finding in terms of the impact of negative experiences was that of a *feeling,* often followed by something like "I don't want anyone else to feel that", "I don't want to be like that", or "I don't want to be that kind of a leader". The feeling was sparked by the "*memorable teeny, tiny little blips" (Timothy, pg. 13)* when they were set up for failure, undermined, devalued, silenced, or coerced into something. For example, Spike shared an early career meeting where other leaders were ridiculed and treated with disrespect by their superiors. Observing that, as someone aspiring to leadership, he asked himself *"Do I want to be part of this?" (pg. 16).* Zachary also recalled a meeting in his early career when he found out about his work responsibilities being altered:

> So, I walked away from that experience thinking 'Wow, that is something that I will never do to somebody else!' If I ever have the chance to be in a formal leadership role, given that negative experience of just being told what to do without prior consultation, I will never do that to another person or another faculty member. (pg. 7)

Moreover, Ernest described how observing the disconnect between words and actions changed his approach to leadership:

> So, if you're saying to your direct reports 'It's really important that you develop good relationships with your people and that you listen to them', then, I think, it's important for strong leaders to do that and to make time. It was something that I observed frequently in higher ed, where it just was not done. It wasn't done! People weren't spending time with their people, or weren't listening to their people, and they weren't being respectful or trusting of them. I felt … this was something that I saw that changed my approach to leadership. (pg. 18)

Participants also shared some of the learning moments when dealing with failures, mistakes, disappointments, job loss, and other types of negative experiences. Some of the most memorable lessons were learned from experiences that inherently came with *"an immense amount of failure" (Hannah, pg. 19).* There was a lesson learned from each negative experience. Spike shared what he learned from such experiences:

I think that the failure helped me develop some perseverance, patience, continue my learning, and gave me some perspective, as well. I learned that a door may close, but another will open. How do I make myself ready for that? (pg. 25)

One thing was certain—failure was an inevitable aspect of leadership:

I think while it's very difficult, many leaders at some point in their career have to face up to a failure, whether it's a failed project, whether it is leaving a role, or being asked to leave a role, or being terminated from a role. It's amazing how many people [go through this as part of leadership] (Hope, pg. 24)

A "good support network", reflection, and asking "what did I learn from this?" or "what was my part in this?" helped participants overcome negative experiences.

New Leadership

People's leadership perspectives were often shaped by their past experiences with leadership. When leadership changed, both leaders and followers required time to adjust to this change. Some participants shared their experiences as new leaders. They shared challenges they faced and that they needed to be resourceful in addressing them. For example, being in a new leadership role, Ernest struggled with the disconnect between his own values and expectations and the *"deep-seated patterns of staff behaviours" (pg. 10).* Maggie shared a story about how a *"public demonstration of dissent" (pg. 15)* was a turning point for her team, which in time, developed capacity to engage conflict, ask the hard questions, and not be afraid to disagree. These instances often opened doors for discussions that encouraged teamwork and inspired change. When Shirley reflected on her leadership experience, she said: "*I don't think I did a very good job as I would've hoped in bringing those values [diversity, engaging conflict and different perspectives] into the team*" (pg. 11).

In the stories that participants shared, it appeared to be the leaders' responsibility to create a trusting environment for their teams. Participants evoked their own experiences in such environments and some distressing moments when trust was missing. For example, participants who held Principalships worked in multiple schools, often being appointed during or post-crisis. They shared experiences such as dealing with unprofessional and unethical behaviour, mishandling of finances, issues of harassment and assault, or the aftermath of a former principal quitting. Margaret highlighted the difficulties she encountered when entering her first Principalship without

leadership training whereas Amber commented on systemic barriers and lack of structure at the district level to support Principals undertaking new roles. Spike highlighted the lengthy process of building trust within the community his school belonged to. Listening to their stories, I asked myself if there was an assumption that solely being part of the system and moving up the ladder sufficed in equipping someone to deal with the challenges of leadership.

Trial and Error

Participants shared that they developed their leadership through trial and error. Every time they succeeded in a new situation, they found new strategies to use in the future and motivation to take on a new challenge. Trying something new usually started with a decision "*to put some of what I learned into practice" (Amber, pg. 8).* In participants' stories, "what I learned" referred to what they learned from their studies, from experiencing something, from engaging in conversations with others, or from observing how other leaders approached challenges. Trial and error entailed finding new ways to resolve practical issues, changing how people perceived issues, as well as dealing with uncertainty in terms of outcomes and perceived risks. It was, in a sense, refining by doing. In those pressing moments of ambiguity, what seemed to help was being comfortable with the unknown, openness to being challenged when needed, resourcefulness, persistence, organizational support, curiosity, and courage.

There was consensus in that the most useful approach in the change process was engaging stakeholders such as teachers, staff, students, and parents in the decision-making, so that they had a voice and the change was meaningful to them. It seemed that it was important to *"create space, so that school leaders can take those risks to try something different in their schools" (Mercedes, pg. 9).* Hannah's approach to leadership development was "*to expose myself to challenging situations that test me and my abilities. It's often in spaces that I'm able to identify my gaps, my weaknesses and failures, as well as my strengths and capabilities" (pg. 18).* In these new initiatives, what mattered to Spike, for instance, was to *"develop a reputation as a reasonable, credible, dependable leader […] in terms of expectations and working with others and building relationships" (pg. 3).* Conversely, Mercedes shared how bad leadership, which transpired as "*lack of trust, […] lack of knowing, […] lack of understanding" (pg. 33),* limited her ability to grow professionally by experimenting new ideas and methods in her

teaching students. Participants acknowledged that, although not always easy, their role as leaders was to inspire change and empower others to do their best work and improve student learning.

Summary: Learning "How to Be a Leader"

A variety of positive and negative experiences played major roles in participants' leadership development. They developed their leadership by pursuing different roles in new organizations or by approaching practical issues on a trial and error basis. The memorable lessons presented in this subsection were drawn from participants' experiences as leaders, peers, or followers. They prompted reflection through which participants found deeper meaning and often, new insights of leadership. While experience taught participants *"how to be a leader" (Avery, pg. 9),* education taught them *"about leadership" (Ernest, pg. 5).* The latter facet of leadership development is the focus of the next subsection.

4.4.3. Learning "About Leadership"

Participants in this study developed their leadership through different forms of education, as well. This subsection presents findings related to the third theme on leadership development, which incorporates formal, informal, and non-formal education educational experiences and how these contributed to participants' leadership development.

The Doctorate: Taking "A Lonely Journey", Yet Not Alone

Although I did not ask a direct interview question about the program, all participants mentioned their Educational Doctorate in Leadership (EdDL) as being part of their leadership development. When they did, I probed for more details. This section presents findings that emerged from data related to the program, namely, motivation, experiences in the program, benefits, challenges, and support received during the program.

Motivation

Several participants shared that they were motivated to pursue the program because of issues they encountered in practice. For example, Ernest mentioned that

observing a lack of leadership was *"one of the drivers for me to go back to school and learn about leadership and higher education and policy" (pg. 5).* Amber pursued her doctorate hoping to "*gain some deeper insights as to what I might be able to do [in a new school] to help things move forward in a more professional and healthy way" (pg. 7).* Participants also mentioned curiosity as one of their main motivators to pursue the program, followed by career advancement and personal growth. For instance, Mercedes had *"more questions than answers as a practitioner" (pg. 2);* Noah had a keen interest in research and program development; and Timothy wanted *"to stimulate the other part of the brain" (pg. 2).* For others, like Maggie, the program helped with shifting perspective from knowing to curiosity. She recalled how she felt at the start of the program:

> I was paralyzed! [...] I was learning so many conflicting aspects of what I had previously been doing [...] I was finding new ways in which I could reconcile my work that would still allow me to be curious. (pg. 1, 2)

Finally, many participants said they pursued the doctorate because they wanted to change something in their organization or system or because of their experiences with "bad leader(ship)".

Experience in the Program

Participants in this study talked about what they appreciated during the program. The cohort model was one of the primary reasons why they chose to enrol in the EdDL program. Most of them mentioned the cohort diversity in terms of roles, institutions, and career stages of their classmates while one participant referred to the cohort as homogeneous. Working collaboratively, sharing ideas, celebrating milestones, and walking through challenges together offered structure and support, as well as rich opportunities for learning during coursework. Some participants gave examples of courses that they found useful and directly applicable to their own practice: Johnny talked about topics related to policy and engaging diversity; Avery referred to courses that presented leadership history and trends; and Timothy highlighted research methodologies, philosophy, and course assignments that focused on practical issues. Zachary stated that *"the richness of the education in my doctoral degree was in the dialogue with my cohort" (pg. 9).* He found storytelling meaningful as it offered opportunities to share and learn about what had worked and what had not in others' practice. However, awareness of other's practices alone was not enough. Participants

acknowledged the need to be responsive and eager to apply what was suitable in their own practices.

The doctoral research was an important component of participants' leadership development. Their research was mainly grounded in personal interests or issues directly related to their practice. Hence, participants looked at their research as a way to inform their practice. For instance, Spike's research helped him *"develop a philosophical perspective, a leadership perspective, [and] a deep understanding of current research on [the topic of interest]" (pg. 2).* Moreover, Mercedes said that engaging in her research *"brought me solace because I answered [important] questions" (pg. 20).* Sunny discovered he was not "alone" in his questions about the topic he researched, and Jake's research helped him find meaning and understanding. Finally, Spike, Emma, and Ernest referred to gaining specific skills such as writing, researching, and presenting, as well as self-confidence and voice.

Referring to graduate programs, in general, Jake stated that they had to be transformational because *"we're building leaders" (pg. 22).* Preparing students for a specific profession appeared secondary compared to being able to think critically, in addition to taking the lead and navigating the complexities of their future professions. It seemed more important *"to prepare people to embrace the unknown […] To teach people to become comfortable with a lack of certainty." (Jake, pg. 28)* in a changing professional workplace. Zachary and Emma emphasized student leadership in their practice, stressing the importance of empowering students to make informed decisions about their career choices and encouraging them to pursue student leadership roles that were available to them. Dealing with ambiguity, being able to clearly state and defend your perspective, and problem solving were some of the main challenges encountered in leadership. Therefore, when Spike shared examples about class activities that were meaningful to him, his saying *"we didn't know that at the time, [we were prepared for what was expected later]" (pg. 26)* sparked a thought of "intentional teaching strategies" in leadership programs. Since lack of preparedness in the abovementioned areas may have negative implications for leaders, teams, or organizations, creating opportunities for development of such capacities in leadership programs is vital.

Participants either stated directly or through examples their perceived responsibilities for student learning, which confirmed that for them, education was about

learning and change. Jake's statement when referring to specific student cases that *"some students go through [a graduate program] pretty much unchanged" (pg. 32)* could apply more widely. This change is indeed a two-way street. Examples related to impactful changes in student's life provided by Hope, Noah, and Mercedes showed that it was not only the educators' responsibility for learning, but students', too. The attitude toward learning in school may translate in the attitude toward work and learning in the workplace. Maggie indicated how her influence as an educator in her organization inspired others to continue their formal learning. In a sense, for participants in this study, the experience during the doctoral program set the stage for lifelong learning about leadership and gave them opportunities to engage in the development of leadership strategies that they could also implement in their practice.

Challenges

Participants also talked about challenges that they encountered during the program. For example, what seemed to affect them the most was that *"we lost touch after the [coursework]" (Spike, pg. 34)* and dealing with the *"big void [after defence when] nobody has any interest anymore in you" (Timothy, pg. 42).* Several participants referred to either leadership, teaching, or parts of the program as isolating. Ernest made a direct comparison: *"as a leader—just like doing your EdD—it can be a bit of a lonely road" (pg. 15).* Three participants referred to challenges such as lack of support, appreciation, and interest they met with in pursuing their doctoral studies, mainly coming from their leaders or the organizations they belonged to at that time. Some participants also mentioned that life did not stop just because they were doing a doctorate. They had to navigate life changing events while in the program. In the midst of these "life lessons", they felt they had to "make it work", to "keep going", "draw on your inner reserves", and build resilience and endurance. Nevertheless, their own perseverance was not enough to handle a *"tremendous amount of work" (Ernest, pg.7)* that going through the program involved and they needed support from others. Emotional aspects related to going through the program were also raised in interviews, from specific examples to comments like *"Doctorate is very hard, and it plays on your emotions" (Emma, pg. 18).* It seemed that the experience itself was preparing participants for leadership as "an emotional journey".

Support

Although a "lonely journey", participants often leaned on their classmates and "thesis buddies" with whom they forged relationships over time because some of the complexities of a doctoral journey *"no one really understands […] beside other students" (Ernest, pg.7).* They also highlighted that the expertise, dedication, and encouragement offered by committee members and the "altruistic support" and push from their families were key. Looking at what participants thought about a leader's role in achieving goals, Joy exemplified how leadership was enacted by the faculty members: "*The professors were amazing! They knew when to step back and let us move forward or if they needed to intervene, or question, or suggest, they did" (pg. 11).* In a sense, all the supporters modeled leadership in some ways for participants.

Benefits

Participants mentioned not only why they chose to pursue doctoral studies in leadership, but how the program benefited their leadership development. To begin with, participants talked about the benefits of engaging in disciplined self-reflection. The program helped then learn what reflection really was and how being a reflective practitioner helped improve practice. Other benefits of the program were *"instant networking" (Ernest, pg. 11)* and career advancement. Sunny credited the program for broadening his understanding of leadership, emphasizing that *"the EdD definitely elevated my leadership, no question" (pg. 20).* The program's reputation helped Hope *"make up for unusual credentials" (pg. 5).* Also, the "formal paper" helped build credibility in organizations or the field, often manifested in being invited to conversations or opening doors for new career opportunities. Many participants changed their roles or organizations during or after completing the program. Others were in formal roles that required a doctorate. Some stated that they started with a goal in mind, related to a specific role or organization, but their goal changed later because they found a better fit in another sector or type of role, or they found a different purpose, usually with a larger impact.

The *"beauty of a program like that" (Timothy, pg. 41)* was that it gave participants a foundation for leadership development and access to leadership terminology and literature. Participants found value in being exposed to research and theory in various areas of education as it deepened their understanding of leadership concepts. The

program offered opportunities to explore topics of interest, generally, with practical applications. It also included valuable readings that laid a solid theoretical foundation for the work they embarked on. Moreover, the flexible structure of the program helped participants integrate it with the complexities of their lives and create space for learning. Many participants referred to either becoming more grounded in their perspectives or experiencing a change in perspective, discourse, or approach to leadership. Victoria also specified how the program helped her recognize differences between various leadership roles within institutions. Shirley, who worked as a staff member at some point in her career, talked about a *"comradery [with academics] that wasn't there before" (pg. 19)*. Finally, the doctorate offered participants who attended it in mid to late career a new beginning for post-retirement endeavours. Some direct references to the EdDL program, lessons learned, and benefits are:

> I *can* talk about this! I have a voice... not everyone would agree, but that's OK. The point is: can you stand up in front of a group of people, explain your position, and take questions? That helped me in all my work as a ... leader. That was a lifelong lesson! (Spike, pg. 26, 27, original emphasis)

> How I'm using my [doctorate] learning? It's very much listening deeply to their [clients'] experience and then thinking back [on] what would be important to me as a leader [...] helping them to see 'if you take that next step...' and asking for their involvement and their thoughts and ideas [...] Because I can speak that educational language, I'm able to have that kind of dialogue. (Margaret, pg. 6)

> I was finally able to address [others'] questions differently, and we had a different level of conversation in terms of... when we're talking about any issue related to post-secondary. (Shirley, pg. 15)

> ...it helps you articulate yourself a little bit in front of yourself. You always knew what you knew, but you never really had a way to write it down in five sentences, and now you can do that. So, that's what I found so helpful. (Timothy, pg. 41)

> [The doctoral program] showed me that post-secondary is a different world than corporate. In post-secondary, to solve an issue, you need not only to understand it, but have evidence. [PSE is] a world [where] you can't wing it on opinion. And there's a lot of opinion out in the hallways [of organizations]. [...] EdD gave me an understanding of leadership, and confidence and strength to be a better leader and decision-maker. (Sunny, pg. 20, 21)

> [The doctorate was] a catalyst in the evolution [of my leadership]. (Ernest, pg. 26)

But absolutely without question, it [the EdDL experience] was transformative. (Joy, pg. 11)

The Ever After: Learning after Crossing the Stage

For participants in this study, leadership and learning were closely connected, and their learning about leadership did not resume to their formal education. They learned through continuous reflection, by taking on new roles in new organizations, or by engaging in non-formal education, which are detailed in this subsection. In fact, for some, the doctoral program was only the beginning or an important part of their lifelong learning:

> Good grief, I had an EdD in Educational Leadership! I thought I had thought and studied and reflected a lot on what it meant to be a leader, and yet when I got into the [formal leadership] role, there were still things that [were new]. They might be situational; they might change based on who your people were. (Hope, pg. 11)

> Certainly, you never stop learning how to be a leader, or educator, or researcher, or whatever your role is. (Zachary, pg. 9)

> I firmly believe in lifelong learning and continuing and never stop learning. (Ernest, pg. 12)

> Oh, definitely keep learning. Leadership it is all about learning and it's about dealing with people, but definitely learning, facilitating... (Emma, pg. 9)

> we lead for different reasons: we lead to have power, we lead because it's more fun than being led sometimes. But [leadership is] about mentoring, supporting your people, and protecting your people who support you in turn. [It is] about learning and personal growth, I think, as much as anything. (Jake, pg. 10)

> I honestly believe that I don't know everything […] I know there's so much I don't know, not that I just don't know everything. There's so much I don't know that the people that work with me need to be able to step in confidently to share what they know. Because then, we will—when we have everyone in the room—we'll have a more complete picture… still not totally complete, there's always a more complete picture. (Maggie, p. 22)

But Timothy mentioned one area of learning that was different outside the formal education: attempting to deepen his understanding on a subject by studying books on his own. He felt that in order to fully understand a new topic, he needed the "conversation" with others and a *"master in [the] field to guide and ask you the challenging questions" (pg. 43).*

Reflection

What I found fascinating is that all throughout the interviews, participants linked leadership not only to learning but to reflection as well, emphasizing the roles that learning and reflection played in improving their leadership practice. When I asked Mercedes about what informed her leadership, her response showed that reflection helped her gage *"what I'm experiencing, taking that moment to carve out, to understand what's happening and then, understand my role in it" (pg. 3).* This indicated internalized learning and reflection on practice. It appeared that reflection became part of participants' professional practice. They transitioned from reflective learners to reflective practitioners. In general, reflection helped them "*to understand metacognitively what I did and [begin] to apply that and model that in my role" (Margaret, pg. 13).* Engaging in reflection also helped participants learn from mistakes, find solutions to practical issues, identify *"promising practices" (Victoria, pg. 14),* analyze situations and differentiate between old and new paradigms or practices of leadership, and understand that some issues were beyond one's control.

New Roles

Participants suggested that learning in new roles was not only inevitable but motivating. Those who were in a career transition at the time of the interview said that they were open to new opportunities that would provide inspiration and prospects to make a difference. Those who were in new organizations or sectors referred to themselves as "still a learner" and looked forward to learning more about what the roles entailed and not only contribute but continue to develop their leadership. Like Maril, many were continuously looking for *"ways to update my skills to provide me with the competencies to manage those [new] aspects of my job" (pg. 16).*

Though somewhat anxious about what the future might bring, participants looked hopeful and excited to face new challenges. They were motivated to continue a new trajectory and discover new *"pathways to the possible" (Noah, p. 16).* These new opportunities required them *"to learn a new way of being" (Mercedes pg. 17).* Some specific learning in new roles highlighted in interviews were: slowing down in making decisions and taking time to gather all information before making big changes; dealing with frustrations and the urge to "fix right now"; adapting to organizational or job-related situations; system thinking, which would *"benefit both teaching and my capacity to do it*

well" (Victoria, pg. 10); learning *"strategies for navigating more complex settings" (Maril, pg. 8);* dealing with conflicting demands and challenges; and helping others see the big picture.

Non-formal Education

Participants referred to learning from attending workshops, seminars, conferences, and other events organized by and for people in a professional field. Generally, these non-formal educational opportunities—which were common across sectors—offered by organizations and professional associations were helpful but seemed to focus more on transactional and operational aspects of formal leadership. Because of their short duration and lack of space and time to explore issues thoroughly, they did not seem to suffice in addressing complex leadership issues. However, combined with formal and informal education, these opportunities contributed to participants' development of leadership and implementation of practices. By engaging in these opportunities regularly, participants could also continue to network with other leaders and experts and whenever possible, continue to disseminate knowledge. For example, several of them expressed their concerns with solely relying on non-formal education for leadership development. They wanted to get involved in improving such learning opportunities to offer those pursuing them ways to deepen their understanding on leadership.

Summary: Learning "About Leadership"

The Educational Doctorate in Leadership program was an important component of participants' leadership development. Although their journeys in the program differed, they all recalled the impact their learning in the program had on their personal and professional development. Some thought that the program had the biggest influence on their leadership development. Others said that they began developing their leadership through relevant experience and the program solidified their leadership perspectives, offered access to theory and research, and allowed for dedicated time and space to explore leadership further. Their motivation to pursue a doctorate stemmed from curiosity, personal growth, or hope to improve their leadership practice. They chose the program because the model fit within their lives or the program was in line with their career goals. The program offered participants the opportunity to engage in dialogue with their peers, provided foundational knowledge about theory and research, as well as

exposure to various perspectives and engagement in research rooted in their interests or with direct application to practice. By engaging in class activities and research, participants experienced a change in perspective or became more grounded in their own perspective because they understood it better. Disciplined self-reflection was a major contributor to this change. Although in sharing their stories, participants focused on both challenges and opportunities, the opportunities outweighed the challenges. They met with challenges in navigating the program while living complex lives, yet the support and encouragement received along the way helped them reach their goal. The program helped participants develop specific skills and become better prepared for leadership, inspired confidence, and gave them credibility in the organizations or field. Most importantly, it instilled a lifelong love for learning that manifested in many ways upon completing the program.

Learning "about leadership" continued after the completing of the doctoral program. New roles, organizations, and transitions between sectors provided new opportunities for learning how leadership was to be implemented or adapted to new contexts. Reflection became part of everyday practice; hence, it helped participants address complex situations by thoroughly investigating their different facets and adapting strategies previously learned and applied. Participants also accessed various professional development opportunities, which helped them network with other leaders and share leadership practices. The next subsection adds a new facet to leadership development, focusing on another set of experiences, in which participants learned from people who served as models of leadership.

4.4.4. Learning "The Dialogue of Practice"

Participants in this study indicated that they developed their leadership by interacting with or observing others. They referred to acquiring experience in a role or organization by receiving and implementing feedback, participating in conversations about leadership issues and practices, as well as accessing scholarship and engaging in research on leadership. This section presents findings related to the fourth leadership development theme, which includes insights on how participants learned from working with or observing formal or informal leaders, collaborators, mentors, and other people who served as models of leadership. It first presents the role of dialogue in leadership, then it describes various mentors or role models that participants had, followed by their

offering mentorship to others, and concludes with some guidelines for "good" mentorship.

Why Dialogue?

In participant's perspectives, bringing stakeholders together, including them in decision-making, and encouraging collaboration were valuable in leadership development because they offered different ways of working through issues arising in practice. Avery highlighted that it was in a trusting environment, "*in the dialogue of practice that leadership can evolve" (pg. 13).* Participants emphasized that when dialogue took place in such environment, usually, people shared with others their experiences, expertise, and challenges without fear of being judged. These spaces were created by engaging in mentorship, within organizations or community partnerships, at conferences, or through professional associations.

The dialogue with others provided a place not only to discuss and find solutions to discipline-specific issues, but also disseminate current research in a field of interest. Like Zachary commented: *"it's not only attending these formal [events] but it's also being cognisant and aware of what's happening in the practice of other leaders around you. That's constant" (pg. 10).* Mercedes also emphasized the importance of creating space and dedicating time, so that people in a community of practice could *"connect and sense-make together and really feel that belonging, [that] membership to community" (pg. 4).* Inviting participation in conversations that aimed to disrupt the status quo allowed community members to contribute and learn by asking the *"really though questions, [...] moving forward on initiatives, and to see if they work or not" (Mercedes, pg. 6).* These discussions also created opportunities for those who were not usually involved in the change process, such as students and informal leaders, to contribute. In this sense, Amber shared with enthusiasm such an experience when student voices were included in a school-wide initiative: *"these [students] were just little X-year-old people, but it was amazing [to hear] what they admired about their school, what they were really hoping for as learners, and what they really did not want" (pg. 8).* Also, Spike recalled how he became aware of the leadership exercised by an informal leader whom he learned from and appreciated, and the impact that she had in time of change:

> I learned to pay attention, to listen to what was being said. She would
> bring ideas and I would reflect, discuss with her, and share them with

others. I started to realize her leadership and value to our school and to my own leadership. She was a mentor in many ways and yet she was not an official leader, but an informal leader. She was someone with so much experience, so much care for kids, and [she] wanted change. And we were open to change. We were ready for change. We were thinking we do need to change things. We need to change to improve learning and teaching. So, listening to that person helped guide me to make some changes and to bring others with me. (pg. 19, 20)

In addition, when reflecting on her leadership development, Hannah highlighted the impact that those whom she called the "rocks of Gibraltar" had by offering feedback and advice openly, particularly when *"not so good intentions or self-serving tensions" (pg. 24)* seemed to surface. Hope went further and emphasized not only the need for reliable critical friends to hold leaders accountable, but how with climbing the organizational ladder, they became scarcer. Although finding people to challenge the leaders' ideas was more difficult at times, they were crucial. This idea was also suggested in one of Spike's stories that showcased the destructive and pervasive consequences of the lack of accountability mechanisms, which in turn, resulted someone's acting like "singular power" in making decisions. As emerged from others' stories, such consequences affected few or many, from individuals to entire organizations, depending on the sphere of influence of such a leader. Dialogue is an important component of leadership and as seen in the examples provided in this section, it helped participants develop their leadership and learn from and with others.

Mentorship

Mentorship is a form of informal learning. In this study, a mentor is someone whom people learned from, interacted with, or whose leadership approach they modeled. Participants shared stories about their mentors and their being mentors for others, aspects of mentorship that are presented next.

Finding a Mentor

Mentors were key in participants' leadership development as they provided guidance, support, and created opportunities for learning and growth. "*I attached myself to people", Mercedes (pg. 18)* said. Mentorship was a form of informal learning and in professional settings, mentoring relationships could be formalized (as part of training and professional development) or not. As presented in the section about what informed participants' perspective of leadership, participants did not make clear distinction

between the mentors and role models. Hence, the findings in this section are based on instances in interviews when participants referred to "mentors", someone they learned from, interacted with, or whose leadership approach they observed and modeled.

In general, mentors gave participants a wide range of experiences to draw from in their practice. While Timothy said he had one real mentor in his life, others had multiple mentors who helped them develop in complementary areas of leadership. For some participants, the first influential leadership models were parents and when mentioning them, participants described what they admired or learned from them. For example, Avery said that his family had a huge influence, and that his mother *"helped shape who I am" (p. 12);* Hannah described her father as the action-oriented educator and the *"creative source" (pg. 16)* and her mother as the advocate and strategic but *"quiet fighter" (pg. 17)*; Noah learned from his father to persevere; and Timothy to stand and work with the crowd.

Mentors effected change in others and modeled leadership, inspiring participants to become *"one of those [strong] leaders" (Ernest, pg. 4).* When searching for his mentors, Jesse looked for someone resourceful who had a different perspective *"because I already know how to be me" (pg. 24).* In addition, Joy recalled that her mentors were authentic, calm in crisis situations, and good listeners. Victoria mentioned how important it was that mentors provide a "platform" and create opportunities to implement innovative ideas. Moreover, Ernest mentioned that he valued in one of his leaders the balance between work and play, honesty, and knowing when and how to "show disappointment" in followers' actions. Finally, Timothy's mentor *"combined authenticity and scholarship perfectly" (pg. 11).*

Some of the ideas that emerged from participants' stories about how mentorship influenced their leadership journey and helped with their leadership development were: observing and emulating others' practices, creating meaningful alliances, consulting with others in challenging situations or when facing dilemmas, and finding support in implementing innovative ideas. Open communication was central in developing lasting and meaningful relationships. Participants admired their mentors' dedication, fairness, thoughtfulness, humility, steadiness, and curiosity. Their mentors were courageous and influential people who left a legacy in their organizations or field. They were supportive, encouraging, and inspiring. Often, they were persuasive in their guidance and helped

others find clarity through questioning. In a nutshell, mentors offered what participants needed to become better leaders.

Being a Mentor

Finding a mentor for themselves was important to participants, but so was being a mentor to others. Participants strived to give back and be mentors, guiding others on their career journey. They considered mentoring others *"the point of being an educator"* *(Hope, pg. 9).* Jesse said, *"I really, truly believe in mentorship" (pg. 12).* Noah emphasized that his mentors who came from different backgrounds and industries invested generously in his career development and allowed him to see leadership in various ways. He learned tremendously from them, hence he felt *"an obligation to do the same for others and I like doing it." (Noah, pg. 15).* Many other participants commented on how rewarding mentoring others was, emphasizing the long-term journeys. They shared stories of students or colleagues, other leaders or followers who they mentored along the way. Mentoring people on their teams was an important part of formal leadership, too. Several participants highlighted the need to mentor new hires and more junior colleagues and help them navigate the organization's policies and practices.

One idea that emerged from participants' stories from PSE was related to offering student mentorship and the perceived impact they had on the student's careers. Noah recalled a student who was "petrified" in one of his classes and how with support and encouragement offered through mentoring over the years, that student launched on a *"meteoric career" (pg. 14).* Others like Emma, Victoria, and Zachary commented on their offering mentorship to their students and finding helping them on their career journeys rewarding. Hope was also enthusiastic about continuing her connections with her former students and sharing in the excitement brought by finding out about their successful career journeys. She emphasized how *"what makes me get up in the morning [is]: What are you [Hope] doing for students? What are you doing for the community? What are you doing to help society?" (pg. 9).* This could also be an indication of the influence others had on her life. When sharing such stories, someone whom she called "extraordinary" defined leadership in this way:

> If she could go home at the end of every day and believe that she'd made a difference for one person in the organization, she was doing her job. Very powerful. And it's very powerful work for someone like that. (pg. 10)

Thus, leadership is about influencing and helping others.

Guidelines for Meaningful Mentorship

Initiating authentic dialogue in a non-judgmental environment was often conducive to learning and change. There were several guidelines for meaningful mentorship that emerged from the experiences that participants shared with me. For example, mentors did not hesitate to challenge their mentee's perspective and offer constructive feedback. They also shared with mentees their own negative experiences, which inspired confidence and trust. Additionally, participants helped mentees discover what they were good at and offered support and recognition that allowed for personal and professional growth. Often, mentors learned from their mentees, too. An effective practice that Jesse shared was mentoring a large group of people, which facilitated promotion and succession planning. People's career plans may change unexpectedly, thus, it was helpful to have a group of people who were equipped to assume new roles and challenges when needed.

Participants also shared stories about receiving and giving feedback. Hope highlighted her willingness to be challenged and openness to receiving feedback from her team: *"I think it's very important that, as a leader, you be willing to be challenged and hear ideas other than your own." (Hope, pg. 10).* Along this line, Timothy said that what differentiated academic leaders from other types of leaders were their being comfortable with being challenged and even the expectation that others questioned their leadership approaches. Nevertheless, reflection was key in both feedback and mentorship. Rather than merely copying others' practices or following their advice precisely, participants encouraged reflection and astuteness. For instance, Sunny and Noah highlighted how their leadership evolved over the years and the important role others' mentorship and careful guidance played in this development. As well, Jake stated that *"you have to have been challenged by life before you ever find humility. And you can't be a good leader unless you bring some humility to the task" (Jake, pg. 23).*

Building on the idea presented above, mentorship needs to be approached carefully and tactfully. Not only because mentorship means providing one with constructive feedback and requires skillful approach, but also because not everyone is open to receiving feedback or recommendations for personal change. For example, there were two types of examples in the dataset showing that not everyone holding a

leadership role was open to feedback. On one side, there were senior administrators that welcomed feedback. For instance, Jake shared a powerful story about an administrator asking him *"What do I need to change in order to work with you better?"* *(pg. 9).* This encounter demonstrated one's willingness to receive feedback from someone they formally lead. But more importantly, it showed how Jake's idea of leadership at that time was challenged and contributed to his understanding of leadership: *"I never thought of that"* (pg. 9), he said. Such experiences empower followers. On the other side, other participants shared experiences about leaders who were not open to feedback or were even offended that someone would challenge them. For instance, Timothy highlighted that sometimes, other leaders (i.e., peers) *"don't want to be taught […] You have to be very careful because you may appear to be arrogant or they're just bored by it. They don't want to hear about it" (pg. 42).*

Senior administrators shared that sometimes, people perceived leadership as authority that could not be questioned. Thus, it was also vital that senior leaders be aware of how others perceived their leadership and bear in mind that "*the higher up you get, the easier it is to dismiss [people who offer advice and feedback]" (Hope, pg. 27)* or find people who were willing to challenge or question those in positions of power*.* It seemed that awareness and trust were vital in building relationships that encouraged others to think critically and be candid. It seemed that, although both leaders and followers needed to reframe leadership, it was the leaders' responsibility to initiate such shift for their followers:

> I had to learn to temper my own inclinations, so you can make more space for other people to talk. I had to also learn to develop ways that would invite other people to share and contribute because just the fact that someone senior was sitting in the room would shut that down. The higher you go up the ladder, the worse that gets. (Hope, pg. 11, 12)

As leadership in general and mentorship in particular involved people development, participants emphasized the need to approach them carefully, with humility, and respect for one another. Nevertheless, if mentoring others is not approached properly, they could be harmful. Two participants shared experiences showing an unsuitable approach to mentorship and the effect of compromising one's values in trying to please:

> I found that when we talk about leadership, a lot of leaders decide for themselves that they will now be mentors, or at least coaches. And I have always had a problem with that because most of them do not have

the philosophical maturity to be mentors. What they actually do is they tell you how you should be doing things. And that's often not based on some kind of a foundational framework. That's just their own preference. And they extrapolate things 'Well, if you do things like I do, you will be okay.' Whether that resonates with you, whether that actually caters to your own personality, it's completely irrelevant to them. (Timothy, pg. 11)

I was trying to work in someone else's leadership style, and it didn't fit […] I compromised things that I think are important about me, some of my own values and leadership practices and I shouldn't have done that. Because it made me less effective as a leader and it still wasn't enough to please the other person. I won't do that again. (Hope, pg. 25)

Participants' experiences detailed in this section show the importance of developing a personal leadership style while also remaining open to receiving advice and guidance. This is in a sense walking a fine line between knowing when to take feedback with "a grain of salt" and through reflection, become aware of the "*I'm not sure that works for me" (Spike, pg. 14)* moments. As Jesse emphasised, and in line with Timothy and Hope's insights presented above, leaders need to find "*people that you can work with and cultivate that leadership with you, alongside of you" (Jesse, pg.* 13) and be willing to learn continuously.

4.4.5. Section Summary: Leadership Development

A major area explored in this study was related to how participants developed their leadership and how they planned to continue this development. In their interviews, participants connected leadership and learning constantly. Like Jesse said,

…the greatest fallacy of any leader is thinking that they know everything. To think that I am now the expert, you know, I have a doctorate, I have many years of experience, I have a lot of life experience, I have a lot of personal life experience… Never in my mind will I ever say that I can teach anybody the ultimate of how to be a leader. I can help people along, but there's always something that I can do to become better, a better version of myself. (pg. 22)

Participants in this study developed their leadership by gaining relevant experience in leadership roles and often approached unfamiliar situations on a trial and error basis. They were continuously refining their practice by doing. Formal education also played a major role in participants' leadership development. Learning about leadership continued after completing the program, although non-formal education did not have the same impact. But because reflection became part of everyday practice, it helped participants

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address complex situations by thoroughly investigating their different facets. As well, new leadership roles, organizations, and transitions between sectors often provided opportunities for learning. Participants indicated that they also developed their leadership by engaging in dialogue with others, particularly with mentors, other leaders, and stakeholders involved in initiatives. To summarize, for participants in this study, leadership development was not confined within a specific timeframe or space, but it was a lifelong process.

4.5. Leadership Implementation

In analyzing the data for this study, I noticed that the larger part of the interviews focused on stories about how leadership surfaced in practice. It looked like the overall perspective of leadership laid the groundwork for development and implementation. It also helped me contextualize participants leadership stories and then analyze them. Participants embarked on a journey to develop their leadership, so they could use their learning to influence change in their organizations. Aspects of leadership implementation were weaved throughout participants' interviews, even when they were talking about what informed their leadership or how they developed it. As such, some aspects of leadership implementation were briefly presented in previous sections, as well. This section focuses on findings related to the leadership implementation and is structured to follow the four themes that emerged from the dataset: *Leadership is Contextual, Foci of Educational Leadership: Students, Teachers, and Community, Five Leadership Tasks,* and *Struggle and Success in Leadership.*

4.5.1. Leadership is Contextual

In general, leadership was conceptualized by participants as focusing on people, relationship building, influence, and change. But leadership approaches did not merely "transplant" from a context to the next. There was consensus that leadership approaches or practices differed depending on the context and the situation. Context appeared to be given by the place, time, and people whereas situation referred to an issue that needed to be addressed. Sometimes, situations that seemed similar were approached differently depending on the context. In terms of leadership transferability between contexts, participants shared stories about themselves or other leaders they observed who

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developed their leadership within a sector (e.g., academia, corporate, or political) and struggled in a different one. Transitions between sectors where not always easy. Participants' examples came from their experiences related to (K-12) school, district, or board of trustees; (PSE) department, organization, or community partnerships; and (Other) organizations outside education. These examples were of leadership associated with formal positions in organizations or of informal leadership emerging within a team, organization, or community of practice.

Leadership Approach

In analyzing participants' stories, it looked like flexibility and adaptability allowed leaders to respond to a context and situation well. Timing was of the essence, too. Leadership emerged as a core responsibility of people in formal leadership positions. Generally, leadership implementation was contextual. Educational leadership was often about creating space for growth and dedicated time to have difficult conversations and timely "interventions" about resources, pedagogy, limitations, and opportunities. For many participants, leadership meant recognizing others' abilities and passions, helping them understand the intricacies of the situations they faced, and bringing them along "on the leadership journey". Participants used words such as creative, adaptive, collaborative, shared, and transformational to describe approaches to leadership. But being aware of various leadership approaches and draw from them as situations required was perceived as the best approach to leadership. Some of the participants' comments that support these findings are below:

> people who are stuck in a specific leadership mode have difficulty adjusting to different jobs, different perspectives, different locations. Whereas if you have a little bit more of a liquid leadership mode or model, you can adapt the leadership model and you can adapt your characteristics and your strengths and weaknesses to whatever situation arises. (Jesse, pg. 2)

> every school presents very unique culture when you go into it. You can't go from one school to another and be the same principal in all schools. You might end up there being that same leader and practicing the same thing at some point, but there's [differences]. (Margaret, pg. 14)

> keeping our eyes wide open, watching and seeing what was working well and why, what wasn't working well and why, and what we might do as a team to make the lives and the working conditions of both staff and students be great. (Amber, pg. 2)

Furthermore, some participants contrasted approaches of leaders in similar formal roles but different organizations, focusing the conversation on what made an approach resonate or not with people in that organization or community. It appeared that usually, when actions were taken "just for show", the result was often disengagement whereas demonstrating genuine interest would encourage enthusiasm and bring people together.

In general, participants favoured collaborative and participative approaches to leadership. Communication and transparency were essential. So was discerning when a situation called for "rolling up your sleeves" or focusing on bigger goals such as being the voice of the team or organization. When it was the latter, a leader's responsibility was to find, equip, and support the champions—the "great people" to complete the daily work while they were focusing on bigger picture issues:

> [Leadership] brings, yes, courage, but also the ability to analyze and understand a context and what you're going to face when you're doing something in that context, articulate the challenges, [and] look for help. You can't be a one-man show in this, you need the help of good [capable] people. And when you find those good people, trust them, equip them, rely on them, support them, remove any barriers that they face. (Hope, pg. 17, 18)

Maggie emphasized though that leaders *"can't be completely absent, but nor should they always be marching proudly in front" (pg. 10).* Hence, being able to keep a balance and discern priorities and a suitable approach to encountered situations was important.

Educational Organizations

While hierarchy was recognized as existing in K-12, when discussing differences between PSE institutions, the type of institution (e.g., small vs. large, research vs. special focus) seemed vital in how one approached leadership. Nevertheless, not all organizations in a sector functioned the same. Participants in both K-12 and PSE about the focus on students, and educational leadership revolving around issues that were related to student learning and experience. Another overarching goal of educational organizations was recruiting and retaining staff and students. Challenges were somewhat universal, related to resourcing, competition, budget, and lengthy change processes. Some participants brought up struggles related to multi-site organizations such as building a sense of community, cohesiveness of services and processes, as well as defining culture and resourcing each site appropriately. As formal leadership roles seemed to take different forms from an institution to another, participants also stressed

the importance of leaders having a comprehensive view of their local context. This would allow them to create suitable administrative structures to allow for change, along with identifying stakeholders who could support initiatives and invite them to dialogue.

When it came to leadership implementation, participants talked about specific issues arising from their practice and/or more generic issues that showcased similarities and differences between education and other fields. Referring to competing interests and demands, Joy stated: *"I don't think there would be any difference in other industries or business or institutions." (pg. 13).* Nevertheless, the approach to addressing issues seemed to differ. Generally, participants who discussed transitions or transfer of leadership approaches between sectors considered that bringing in leaders who shaped their leadership in other sectors might be problematic unless they understood the new context and the "unwritten rules" of the field. Alex thought that leadership models developed for the corporate field were not compatible with PSE education. In his perspective, due to the multiple layers of governance, leadership in education was more complex than merely *"if you do X, then Y will happen. That's not how it works!" (pg. 16),* which appeared to be the approach in leadership pyramid models that corporations employed. He stated further:

> Faculty members are not like factory workers on a production line. You can't just take one out and put another one in. You can't just discipline them. It doesn't work that way. Similarly, [in] business management, it's not like there's one boss who's dictating into more lower level managers who then dictate to lower level workers. It just doesn't work that way! (pg. 17)

Additionally, Johnny commented on the different levels of support existing in PSE in the form of unions or professional groups. He said that because of the layers of support embedded in organizational structures, leadership seemed to "*take things for granted [and] may not see the need to support [someone] until they are called upon to do the work" (Johnny, pg. 8).* In contrast, in corporate, *"the boss may just look at you and see you as a worker and support you based on your performance" (Johnny, pg. 8).* Noah outlined several ways in which his own leadership approach differed between corporate and academia. In an educational organization, *"if I drew up an edict, it just got done […] everything lined up. It just happened" (pg. 18)* while in a different setting, *"[I needed] to prove myself, rationalize everything, having to justify [it] to people and forces" (pg. 19).* But Maggie shared a story about an instance when applying concepts coming from

another sector had a positive impact on her team's engagement in discussions and action. Then, Ernest shared how his approach to leadership developed in education proved successful outside educational settings. Hence, I suspect that the outcome depends on the purpose of this transferability of concepts. Although some principles are transferable between contexts, the actions taken in implementation depend on the context.

Types of Leader(ship)

Leadership was also defined by what others—the followers or the observers—perceived it to be or the place where leadership was exercised. There were several participants who described multiple types of leaders based on one's approach to implementing leadership. For example, Timothy described several types of senior administrators in PSE, how he thought their approaches differed, and how they were perceived by members of the organization. He described "academic leaders" as enjoying and even expecting that their approach and decisions be questioned. These leaders were described as intelligent and preferring to be with their people and listening to them rather than in the spotlight. Furthermore, "political leaders" would follow "the party line", were usually more operational, focusing on "not ruffling feathers" and often maintaining the status quo. As well, for "corporate leaders", appearance was crucial, they sought the public eye and were "deadly afraid of confrontation". One other participant described four types of leaders who could somewhat fit within this framework. One type was always "ready for the camera" and was superficially engaging with people in the organization; then, one other type was the "really, really busy" leader, who took the time to actively listen when opportunities arose; the "very, very in tune with people" leader, who cared about people and took the time to engage in dialogue; and the "disengaged, indifferent leader", who often seemed "arrogant" in their approach. These leaders described by participants implemented leadership differently and their approaches also had differing outcomes, depending on the context leadership was exercised in. Leading in educational organizations is demanding. Nonetheless, leaders who were amenable to different approaches of leadership and discerned what approach was more suitable in a given situation seemed to be the most successful in their practice.

The Battle Between Old and New

Approaches associated with "bad leader(ship)" seemed to fail in any organization. Aside from them, there was no guarantee that what worked in one context would work in another. For example, when talking about leadership implementation, participants highlighted the differences between older and newer paradigms of leadership and their outcomes. Top-down models were perceived either as part of an old paradigm of leadership or as not working in education. Referring to these types of models and compliance, Mercedes said *"I will comply because it serves me" (pg. 15)* but perceived this leadership approach as problematic and having negative outcomes. Also, Amber stated that *"teachers can very easily nod and bob and say 'yes', and then close their door and do their own thing. You made no effect at all, then" (pg. 5).* In Spike's experience, though, some staff expected the leader to have the vision and make decisions: *"You decide, Principal! … You decide!" (pg. 7).* Hence, his role as a new Principal was to help staff change their approach from "*we've never done it this way […] it's too much work, too hard" (pg. 15, 7)* to *"I [the leader] rely on you [the expert], so we do this [together]" (pg. 23).* This allowed for a "secretive", "authoritarian", or "adversarial" approach to leadership to slowly become a "democratic and participatory" approach, which focused on "what we learned and built together". In such a change process, it seemed important *"not just bringing [people] together around ideas, but bringing them together on moving forward, and directions, and co-creating in a sense [this culture or change] for teachers" (Margaret, pg. 7).*

Collaboration emerged as one of the core leadership strategies in participants' interviews, no matter the context they worked in. It involved creating a *"more positive, even a safe workplace environment" (Zachary, pg. 8)* where input and different viewpoints on an issue were solicited. Participants emphasized that having access to various perspectives and ways to problem solve often offered the best outcome, either in the form of shared vision or solution to practical issues. A team approach and building on *"the strength of the team" (Ernest, pg. 14)* were important. Therefore, participants conferred ways to develop relationships and a sense of "togetherness". In this area, Ernest pulled examples from his volunteer experiences to showcase how socializing, playing, and working together strengthened relationships, also making the analogy that relationships were crucial in crises such as "budgeting-threatening" situations.

Leadership Impact

Leadership may have different outcomes. For instance, Timothy emphasized that leadership outcomes depended on one's role in the organization. As administrator, one could move organizations forward whereas in a faculty role, one had autonomy in their teaching and curriculum, but not so much in terms of initiating wider organizational change. Other participants shared examples of successful change in organizational cultures and the paradigms people worked within, though these processes were lengthy and required extensive work and perseverance. Nonetheless, there were also some stories of new leaders whose vision hindered initiatives that were either in progress or planned to commence despite their being grounded in previous collaborations and the needs that surfaced within the context in the past. To accomplish goals, it was not enough to involve others who were in formal or informal leadership roles in conversations. It was also needed to understand the context and help people see the issues to be addressed, create an environment conducive to learning, encourage open communication and contribution, and use different strategies to make and implement decisions. It was about taking risks and learning from mistakes. As decisions frequently had long-term consequences, in general, rushed decisions were thought to generate "band-aid" solutions and more problems since they usually involved addressing the symptoms rather than the cause of an issue. More details and concrete examples of leadership tasks and processes are presented in the next sections of this chapter.

Summary: Leadership is Contextual

Context is essential for leadership implementation. As such, leaders who possess knowledge of different models of leadership, develop a wide range of leadership approaches, and are flexible in adjusting their style to the context seem to respond better to the situations they face. Educational context present complexities that other sectors do not. Some of these complexities emerged from the data collected for this study and are detailed in the next subsection.

4.5.2. Foci of Educational Leadership: Students, Teachers, and Community

All participants in this study worked in education at some point in their career. Some reasons why they chose education were: it was "altruistic work", "more important

work", offered variety and the possibility of influencing others, particularly students. Alex's reason for being in a leadership role in education was *"I do it because I like teaching and I feel I make a difference. I am doing something positive" (pg. 19)*. From participants' perspective, educational leaders were builders or changers of culture and community within a team, department, organization, or an entire field. Their main roles were to identify and engage stakeholders and develop an environment of trust and conducive to learning and working together. In participants' interviews, there were three main foci of educational leadership: students, teachers, and community. Many described their pursuing new leadership opportunities similarly to Hope: "*a whole lot less about the title and paycheque and all that stuff and a whole lot more about opportunities: What could I accomplish in those [new] positions more than I could in the previous position?*" *(pg. 7)* for students, people they lead in the organization, or community. This section presents findings related to these three foci.

Students: "We Teach All Students"

The first focus of educational leadership was on students. All educators strived for *"the betterment of the student experience" (Zachary, pg. 13)* because *"our mission and goals are all about the students: student learning and student experience" (Joy, pg. 4).* According to participants in this study, in education, faculty, staff, and administrators were involved in initiatives such as changing pedagogical approaches and adapting curriculum, which were meant to improve student experience and reduce attrition. People in all roles conducted research and were involved in initiatives and committee work that called for their expertise within and outside the organization. In all activities, they contributed to and advocated for a cause, a subject matter, or student experience, in general. Many participants were also involved in initiatives aiming to provide or improve access to education for marginalized students, which were often accomplished by changing practices or eliminating systemic barriers. Participants who did not hold formal leadership positions emphasized that support from formal leaders and understanding the policy played important roles in the success of their endeavours. Sometimes, these informal leaders experienced power struggles. At times, as Jake pointed out, they needed to pilot initiatives on a smaller scale and showcase success before being able to implement them wider. Along the same lines, Ernest highlighted that when someone played the role of an agent of change, they would need *"to be within the*

right organization, or at least have the ability to hire the right people to do that [change]" (pg. 11).

In participants' stories, the hierarchical structure and specificities of roles within the K-12 system were more noticeable than PSE. Jesse made the analogy that K-12 system and corporations operated similarly. However, for participants who worked in K-12 sector, the focus was on students, not only at the school level, but district or board of trustees. What participants considered essential features of their work were: *"love the kids" (Jesse, pg. 9)*, the collective responsibility to improve "*student learning [that] leads to student achievement" (Mercedes, pg. 13)*, and building a *"reputation of trust" (Spike, pg. 4).* The "love for kids" came up many times in interviews and it seemed that in all efforts, the focus was on helping students be and see themselves as good learners. For example, in specific district or school initiatives meant for "vulnerable children", the "paramount work" was *"to give these students the best education, the best of everything, the most opportunities […] to help them grow and graduate and become contributors to society" (Jesse, pg. 9, 3).* Hence, one *"can't underestimate the kind of power that we have, the kind of power we have in leveraging the trajectory of student learning, of their success" (Mercedes, pg. 34).* All participants were aware of their impact on students' learning and their responsibility in student success.

When referring to their role within the schools or districts, Principals acknowledged that their main responsibility was not working directly with students even though all their work was driven by students' best interests. Like Amber emphasized, her role *"was to work with the adults in the building who were in the service of the children; to make sure they had what they needed and could move forward in a way that made sense to them" (pg. 19).* She saw herself as a gatekeeper, needing to make decisions that were best for her school at one particular time, especially when dealing with directives from the School District. As teachers had autonomy, the role of the Principal was to check in regularly, be observant of what worked or did not work in their school, ensure participation in decision-making, and provide the necessary resources that teachers and staff needed to complete their work. Jesse stressed the importance of a leader's *"understanding how to weave in a leadership style with what is appropriate for the staff and the students and to be able to merge those things together" (pg. 2).* Moreover, Margaret constantly asked herself *"what's my role here, in terms of this school and what's the most important work I can do to here?" (pg. 11).* Finally, Spike

perceived his role as helping staff assess and change practices to be more efficient in their work. Thus, together, participants and their colleagues would create opportunities and environments conducive to learning for students.

The focus on students was present in PSE, as well. For example, Avery stressed several times in his interview that creating a student-centered environment was the main mission of education and his organization. When discussing creating pathways to education for all students, Avery said that *"We teach all students" (pg. 12)*. Other participants who were in faculty roles talked about the focus in their daily practice as being to support student, which included academic and career advising and referral to other appropriate services available. They were also dealing with issues such as retention, academic dishonesty, or harassment. Leaders in PSE emphasized how much more impactful engaging students in decision-making and change processes aiming to develop a learner-centered environment in their organization was. Thus, wherever participants practiced their leadership, be it formal or informal, their focus was on students, as it should be. As Emma stated*, "In education, you should be there for the students. Everybody's goal should be students. They're here, right and centre, and everything else revolves around them" (pg. 19).* While analyzing the data about the focus on students, often a question came to mind: What would educational institutions be without students?

Another finding that emerged from participants' interviews who taught at some point in their careers was that they perceived teaching as a form of leadership, with student learning and success as outcomes. Hope talked about how different groups of students defined success differently. When specifically referring to students from lower socio-economic backgrounds, Indigenous, or first-generation attenders, she brought up the issue of high schools giving them a "social pass", in which case, they *"didn't really earn a proper academic credential from their high school time and now, they face all sorts of problems when they try to go on to college or university" (pg. 6).* This looked more like setting them up for failure than for success. She emphasized that all students needed support without limiting opportunities and that cultural background and grades did not tell the entire story of someone's life or potential. Occasionally, schools or systems could create more barriers than opening opportunities:

Sometimes, you find that funders and others just look at employability skills, and once students have a really basic level of skill, so they can get like a labour job or an office worker job [...] Okay, that's great, but who knows, there might be a burgeoning geologist, or lawyer, or doctor in that group and why do we limit opportunities? Why do we decide 'alright [name], here's your opportunity and that's what you're doing and that's where you're going'? (Hope, pg. 6, 7)

It looked like sometimes, the passion and dedication of people working in education was not enough to ensure student success. There is a need to eradicate barriers that hinder student success and in turn, expand their horizons and opportunities to contribute to society. More about these issues and how participants or their institutions dealt with them is presented later in this chapter.

Teachers: "We Teach [Students] Well"

A second focus of educational leadership that emerged from the data was on the teachers. All participants mentioned at some point in their interviews the focus on teachers or aspects of teaching as being another priority of educational leadership. Avery, for instance, highlighted the support and appreciation for teachers as they were

the number one reason for success in the classroom of students. It's natural—that's who they see every day and so, we need to respect teachers and support them in their work. It's hard work, both in post-secondary and the K-12 worlds. It's just knowing that they make a difference. And we [administrators] need to help them [teachers] make that difference. (pg. 11)

Johnny stressed that administrators and more senior instructors needed to support more junior instructors by coaching and guiding them in resolving issues related to teaching methods, student behaviour, and organizational policies. Zachary shared a story about how creating an environment that encouraged collaboration helped a group of faculty members *"navigate those channels of disagreement ... through those philosophical struggles... through some pretty difficult decisions" (pg. 3, 12, 15).* This goal was achieved by engaging in discussions about their teaching, student learning, program development, and embracing different opinions and perspectives, *"regardless of professional rank" (Zachary, pg. 12).* Participants also conducted research to improve their teaching. In Jesse's perspective, teachers needed appropriate skill and passion to "do good work". Thus, he stressed the importance of hiring teachers with passion for students and learning and then, supporting them to develop their level of skills by creating learning opportunities and resourcing them appropriately to do their job. Spike

perceived as the leader's responsibility to guide teachers to understand the focus on the students and stressed that teachers did not teach a *subject* but rather taught *students* a subject. Finally, Mercedes emphasized modeling leadership throughout the education system as *"whatever we want for students, we should want for ourselves" (pg. 34).* It was the leaders' responsibility to walk the talk.

Group work and decisions where crucial when it came to new initiatives. Amber though that her role as a leader in moving forward on initiatives was to be mindful of teachers' level of preparedness and workloads. Also, a regular assessment of these initiatives was useful:

> I found [regular discussions] really helpful, in that everyone was then somewhat on the same page. Everyone had a turn to articulate what was important to them and later on, if things were going off the rails a bit, it was easy enough to say 'OK, let's just examine what we're choosing to do here in the context of what we said was important to us.' If it aligned well, great, on we go; and if it didn't quite fit, that gave us an opportunity to adjust our sails. (Amber, pg. 8, 9)

Educational leadership also focused on facilitating conversations for teachers or faculty and creating structures to do their work, which in turn, benefited students. Leaders in K-12 mentioned that their work was to recognize teacher leadership and make teachers central in decisions or work, without "dominating the conversation". The "more excited" teachers were about their work, the better the student success: *"That's the whole reason everyone is there. None of the adults would be doing what they're doing if it wasn't for the students, needing to be there for their education" (Amber, pg. 4).* This way, even in struggles, teachers "did the best of it" to create "*the awesomest [teaching] experience … as we were creating that [great] learning experience for our students" (Mercedes, pg. 27).*

Participants also highlighted that involving not only teachers, but students and parents in decision-making processes was crucial. This way, educational institutions were responsive to community needs. For example, Margaret emphasized how in a crisis situation, community members were *"hungry to come together and rebuilt [the] culture and heal the community" (pg. 14).* Thus, the school became a central place within the community. The next section presents some findings that emerged from the dataset about the focus on community partnerships within and outside the organization.

Community: Building Strong Relationships

Another focus of educational leadership in participants' interviews was on building or rebuilding a community. When participants referred to building strong relationships within a community, they meant either in the organization or between an organization and community partners. Engaging stakeholders inside an organization to build community appeared to be challenging sometimes. Amber stressed that a leader's awareness of what was happening in their organization before taking action played a vital role in rebuilding a community. Margaret added that a leader needed to pay attention to people's needs and expectations. It seemed that it was more likely to build *"a little community" (Amber, pg. 18)* if it were rooted in people's passions and interests.

Engaging teams and building community was a focus of educational leadership across sectors. However, Joy considered that some of the biggest issues in motivating and engaging teams and building community in PSE were related to individual and organizational competing interests, demands, or goals. Moreover, frustration accompanied increasing workloads, which "*really pushed the boundaries of people's capacity and patience, in some ways" (Victoria, pg. 16, 17).* Sunny also commented on the difficulties of bringing together stakeholders with different perspectives and in different roles to accomplish an institutional goal: *"it was like herding cats, it was very much a long-drawn-out process … [to bring people] into a cohesive unit for this [task]" (pg. 10, 11).* Although a challenging process, all participants' stories ended with people finding ways to come together within the organization and engage in transparent decision-making processes.

The other side of community building was related to education-community partnerships. Usually, community partnerships were meant to respond to community needs, improve practices, or create "access to education" for disadvantaged or marginalized populations. Maril, for instance, emphasized that to maintain strong and meaningful relationships with community stakeholders, there was a need for respect, collaborative leadership, and system thinking. That also meant willingness to take part in the process, tackle the "*insurmountable hurdles and barriers" (Maril, pg. 7),* and constantly find meaningful ways to engage stakeholders. She emphasized how by reflecting on what the community needed, she understood the needs better and adapted institutional practices and leadership approach accordingly. She added,

> If I were to be relying on more hierarchical or authoritarian models, not only would they be not appropriate, it would be totally ineffective, and it would have the reverse effect in terms of us, as an institution, being invited into community to support education and community and regional development. (Maril, pg. 12)

Other participants commented on leadership approaches in community partnerships, as well. For example, Emma emphasized that in working with communities, leadership involved passion and innovation: "*We work together to try to make [an] idea reality*" *(pg. 13).* Also, Zachary's team aimed to work together and not in isolation when attempting to respond to emerging community needs. When Spike talked about the focus on community building within and outside his organization, he stressed cultivating respect through hard work and involvement of all parties in every step of the process. Some useful strategies in accomplishing meaningful relationships were active listening, gathering required information, and reflection on practices. Looking broader, participants highlighted that everyone had their role in the system and not working as an interconnected system was often counterproductive. Building community required people to be present and take part in activities.

An idea emerging from the data that fits with community partnerships was related to Indigenization. Several participants in both K-12 and PSE education discussed their involvement in initiatives related to Indigenizing curriculum at the classroom, organization, or region levels. They shared some insights on this topic in interviews. For example, Avery talked about breaking down stereotypes by *"immersing ourselves in Indigeneity and learning the best we can what the ways to go [are]" (pg. 20).* Others involved in such initiatives commented on the lack of knowledge about community governance, awareness of systemic barriers that exist, and hesitancy to take place in culture shifting initiatives:

> There's just a lot you need to know to be a responsible citizen and member of society in the [Region or organization] about Indigenous cultures and the history or Indigenous cultures, modern treaties and self-government. And it's so important that this start in the schools. (Hope, pg. 16)

> I think that the realization there was a whole lack of knowledge around looking at Indigenous populations and how much we didn't know and how much we assumed that we knew and how deeply we failed to recognize the systemic racism that these families had been through and the barrier that that created for them. And we did a lot more talking than we did listening. So, I think that was another big moment for me.

> And it wasn't a moment, it was just a period of time where we had to look at our ethnocentricity and lack of awareness of cultures, and how to bring cultures together and recognize cultures. (Margaret, pg.12, 13)

> I think there is this hesitancy in not saying the wrong thing or not doing the wrong thing, so trying to learn what is the right way to protocol and tradition [would help]. (Avery, pg. 20)

Lastly, Spike talked about building trust and good reputation in the community and involving members in the decision-making. As well, he emphasized listening, patience, and understanding as skills he developed in projects focused on Indigenizing education:

> sometimes the meeting takes a long time because you have to listen. And people are coming from a place where they've had a negative experience and they want their voices to be heard. You have to hear the pain, you have to hear the experiences, you have to recognize them for that, let them have their voice, and [think of] how we can work with that from there. (Spike, pg. 24)

Noah also shared examples of successful initiatives from his work outside education, which were rooted in the same principles of engaging stakeholders and persevering despite challenges. In community initiatives, the primary goal was to eliminate systemic barriers. However, Noah and other participants also talked about setting realistic goals that would result in social change while keeping in mind that some issue would not be "cured" but continue to exist.

Summary: Foci of Educational Leadership

There were three foci of educational leadership that emerged from the data collected in this study: students, teachers, and community. The main role of educational leadership in relation to students was the improvement of student learning and experience. Also, a major role that senior leaders had was to act on systemic barriers and open access to education for marginalized student populations. While in K-12, formal leaders usually worked with adults who then would work with students, in PSE, some formal leaders were involved in teaching students, as well. Informal leadership emerged in new initiatives aiming to assess and improve teaching practices and student experience. A second focus of educational leadership was on teachers, who were considered the main reason for the student's success. Even though the K-12 and PSE contexts differed, the role of educational leadership was the same—create opportunities for growth, support the people they led in their developing skills, and resource them to complete their work. A third focus of educational leadership was on community building,

within the organizations or between educational organization and community partners. Although community partnerships were driven by different contextual purposes, generally, what helped build these partnerships and reach common goals were engagement of stakeholders in decision-making and adaptability to emerging needs. These three foci of educational leadership seem somewhat common-sense, yet the fact that they surfaced in discussions with educational leaders who participated in this study showcases that these leaders know what their responsibilities are and strive to make an impact on their teams, organizations, and society.

4.5.3. Five Leadership Tasks

Building on the three primary foci of educational leadership, this section presents findings about five leadership tasks that emerged from the dataset—relationship development, culture building, decision-making, change, and risk taking. Although these tasks do not encompass all that leadership is, they show instances in which participants' leadership emerged in practice, as well as their outcomes.

Relationship Development

One of the central leadership tasks that emerged from the data was relationship development. The leader was perceived as facilitator and guide, able to empower others, and help them find their intrinsic motivation and passions. Participants shared experiences or commented on how important connecting with people was in leadership. Emma thought of a leader as facilitator in interacting with others and helping them find solutions to issues:

> You can't solve everybody's problems and all the problems. So, you're there to facilitate, to get people to think of best ways to solve an issue. But you are there to also help solve it and help put out those fires. (pg. 4)

Trust and respect were fundamental in cultivating relationships and the lack thereof seemed to affect everyone in the system. Meaningful relationships nurtured growth and helped in moving initiatives forward.

Some insights on how participants approached relationship development and the outcomes are: Avery mentioned his inclination to offer encouragement to everyone, calling it "*my traditional, old style that takes time to sail out to people and to encourage*

them because maybe that's the only positive thing they had today" (pg. 16); Zachary focused his leadership on empowering faculty members to take ownership of their leadership roles as content experts or curriculum coordinators; Victoria commented on the value of feedback she received from students when they eventually recognized "*their learning and their own empowerment" (pg. 6);* Johnny emphasized patience, support, and dedication in mentoring new faculty; and Alex believed that his role was about *"guiding people to come along with me on the journeys to decisions" (pg. 2).*

Other important aspects of relationship development that seemed to help in reaching goals were open communication, authenticity, transparency, and active listening, as well as creating a safe and trusting environment, setting realistic expectations, and encouraging participation. For instance, Maggie shared what she called "a powerful leadership moment" experienced when the implementation of a new idea resulted in meaningful engagement of staff in a team meeting. This story shows how the strength of a team is built by people connecting and trying something new. Other powerful leadership moments were shared by Mercedes—witnessing the reaction of her students to a memorable learning lesson, or of teachers gathered to explore ways to improve their teaching, and Spike—his team's understanding how the new budget or timetable models worked or grasping the positive changes that new approaches to issue brought to practice. Maintaining good relationships and diplomacy were vital in interactions across departments, with unions and other management groups in organizations. In this sense, Sunny highlighted his participative style, as well as being "kind of a bridge" when not having direct authority. His approach was *"I listen, I reflect, I value their opinions, I don't try to ram things through" (pg. 12).* These examples show that even small actions can have important results.

Participants described aspects of interactions between leaders and followers when discussing different approaches to leadership and how these approaches could impact hiring or mentorship. For some participants, it was more valuable to match preferences, skills, and work styles in teams than "forcing" someone to learn something or do something they were not passionate about or did not have the aptitudes for. Jesse for example, highlighted the need for people to find their place in the system based on skills, abilities, and passions as these would make someone *"so, so good at their work" (pg. 27)* and make a real difference in others' lives. In hiring, Timothy would focus on strengths and complementing the team because he felt that in this way, people could

fully contribute while their counterparts would balance on any missing skills and knowledge. This way, everyone was involved and found fulfillment in contributing the best they could. In addition, Emma highlighted that in hiring practices, careful consideration needed to be given to personality, fit, and level of mentoring skills to avoid issues of power struggle, which could hinder success or have more damaging outcomes. Along these lines, Timothy commented that

> A lot of subordinates feel safer with the operational leader because the operational leader can give very clear guidelines […] whereas the inspiring [or visionary] leader usually leaves it to the person. And if the person is timid, or not a visionary, or not a go getter, or not a project manager, then they feel like jelly almost… There's nothing that they can hold on to that gives them guidance for where to go. (pg. 36, 37)

One other aspect discussed by some participants was the impact of closed-door conversations on relationships. Although they were perceived as detrimental to relationship development, there was a place and a time for these conversations in leadership—when dealing with confidential issues. Some examples are giving constructive feedback, especially to someone in position of authority, dealing with privacy or highly confidential personal issues, and sensitive situations where not all information could or should be disclosed widely. Relationship development was considered the basis of culture building, decision-making and change, and findings about these leadership tasks are presented next.

Culture Building

When participants referred to culture, it was either workplace or organizational culture, or related to people's cultural background. They stressed that culture building was a lengthy process. The most important aspect in building culture was successful communication, which for participants meant invitation to participate, willingness to get involved, building trust, and cultivating positive relationships. Culture was often used in connection with diversity. Although participants acknowledged that there were different ways to define diversity, it was generally perceived as a strength in building culture and beneficial to teamwork because it introduced different perspectives and ways to solve problems. But when building culture was coupled with integrating different frameworks of thinking, *"leadership becomes very complex suddenly" (Timothy, pg. 29).* A few participants also discussed culture building in multi-site organizations. It seemed that even though sometimes, each site (i.e., campus or department) developed a unique

culture, finding ways to bring the sites together in order for people to feel part of the same cohesive culture rather than on their own, was the preferred approach. This approach would help with building relationships, implementing change, and dealing with resource issues.

Leaders also had an essential role in creating an environment conducive to "great work". Hope stated that,

> Things don't get done in a culture of fear […] Some things will happen, but it is not a good way [to do things]. It's amazing to me that this still happens so frequently. We know more about leadership than this. It still happens, though. (pg. 23).

Margaret commented on how difficult it was for her, as a leader, to build momentum for change in a culture of complacency, where there were dominant voices, or *"people who wanted to go off in their own corners and do their thing" (pg. 14).* These examples show that not only leaders, but everyone plays a role and a responsibility in building a culture of trust and transparency, however difficult and lengthy this process might be. In fact, Emma defined the "ideal work environment" that she believed in as

> we have a strategy, a strategy and vision. How do we work together towards accomplishing that strategy and vision? If everybody worked like that, if the whole world worked like that, I think we'd be in a pretty cool place. (pg. 11)

Such work environment would allow everyone in the organization to be contributors in implementing strategies and achieving the vision.

Another area related to culture that some participants discussed was rebuilding organizational culture after crisis. They emphasized repairing the culture by attending to the core of issues and not only the symptoms, making justice where needed, (re)building trust, as well as being aware of the ripple effects and possibly, the harmful but hidden repercussions of the crisis. In this healing process, the leader's role was vital in bringing people together, listening to their concerns, and initiating the though conversations. Sometimes, the change from "them vs. us" culture to a "culture of together" was challenging and required patience and tact. Margaret, Maggie, and Spike shared how lengthy the processes of building or shifting culture were. Spike shared an example of a crisis from his earlier career, when people in a community (parents, teachers, etc.) were

upset with previous school administration and anxious about what the new administration would bring, though with little trust:

> They were shouting, they were nasty, impolite, unkind. We had to diffuse that, we had to build trust. And so, we were able to do that [i.e., build culture]. The biggest success was that we were able to find a principal [who] came in and took care of the school. (pg. 29)

In crises, there was a perceived need to find "the right leaders" who could help bring people together in the community before attempting to rebuild the culture.

Nevertheless, some aspects related to culture that could pose issues and result in cultural clashes were cultural biases, stereotypes, or assumptions. Timothy talked about negative aspects of culture such as self-deprecating image or discourse within some professional groups, cultural misunderstandings, and the role that culture played in decision-making and consensus building processes. Shirley stressed that without a leader, teams could splinter if conflicts arising due to diversity were not tackled appropriately. Besides, Victoria highlighted that the lack of guidance and proper support often created a false sense of diversity and cultural sensitivity.

Culture building is a lengthy and difficult endeavour and leaders are expected not only to initiate it, but persistently work on it. The leader's roles as identified by participants were to recognise and address issues, invite others to contribute, and facilitate the process of nurturing relationships and a trusting environment. As seen in this subsection, for participants in this study, culture building was a task that everyone in the organization was responsible for.

Decision Making

Decision making was another leadership task that participants discussed in their interviews. Relationships were essential in decision making. Hannah said that *"without connecting to the people around you and having this kind of transparent, authentic, [and] trustworthy relationships, you're not going to get the honesty that you need to make the decision" (pg. 21).* To move forward in making decisions, participants stressed approaching differences of opinion or conflict with tact, listening carefully to other viewpoints, and asking non-judgmental questions. A leader's lack of awareness or interest in what was happening in their organization was perceived as generating a false sense of knowing or improvement. Mercedes brought up such an instance: *"they didn't*

know what we did [but the assumption was that teaching] must be getting better' (pg. 27). Making decisions required an environment of trust, good rapport among people, and for leaders to "*stay true to my values, which is that participative, consultative style, and genuinely reflect and consider [the imminent issue]*" *(Sunny, pg. 12).*

Most participants highlighted issues related to participation, consultation, and inclusion in decision-making processes. In these processes, *"the goal is to have as many people understanding, participating in the decision, and then on board with the decision" (Sunny, pg. 6).* When talking about his approach, Zachary emphasized creating a respectful, consultative environment. He saw as the leaders' responsibility "*to make sure the team and the individuals in the team feel valued. […] You can't always guarantee equal opportunity but making sure that at least everyone has an opportunity to contribute" (Zachary, pg. 13).* This also involved awareness of personality types and people's comfort zones. It seemed that people *"don't expect to be consulted in every decision" (Sunny, pg. 7)* yet expect the leader to determine when to consult. Along these lines, Hope stressed that leaders needed to discern what to share with others, especially in times of "massive pressures", as not everyone was equipped to carry the weight of leadership. Other participants emphasized handling confidential information carefully. For example, Joy discussed the tensions surfacing during lengthy processes that called for confidentiality and the *"polarization* and *speed [of communication]" (pg.14)*. At times, it was difficult to protect information until it became pubic without this being perceived as "lack of transparency". For other participants, gathering all the information regarding the issue to be solved from all resources available was important. However, Alex and Spike highlighted that when not *all* information was available, a leader had to make the best decision or move forward an agenda with whatever information was available at that particular time.

Reaching decisions in collegial, consultative environments was not always easy. There was agreement among participants that a leader could not please everyone all the time. However, encouraging dialogue was seen as a strategy to understand issues and consider what approaches had the best short-term and long-term outcomes in a specific context. Sunny highlighted that *"it takes a bit of skill to determine—in consultation, frankly—determine what you need to consult on" (pg. 19).* Moreover, Maggie argued that merely talking about opportunities for engagement in decision making was not enough to see results. Creating the infrastructure to allow for this engagement was needed, as

well. Although having multiple voices and perspectives at the table was perceived as resulting in "the best outcome", attempting to reach a common ground all the time seemed to hinder decision-making processes and cause delays in achieving goals. For example, two participants shared difficulties in dealing with a split board of trustees in reaching decisions related to issues that would impact students. Furthermore, for Zachary, what was important in making decisions was listening to everyone and not forcing decisions. Moreover, Spike emphasized that strong decisions involved not only including others, but also not being afraid of having difficult conversations, as well as guiding the process keeping in mind the goals and interests of the stakeholders involved. In all his endeavors, the success was given by making the change *"with and for everyone" (Spike, pg. 8)*.

Consensus-building was perceived as having strengths and weaknesses. Zachary stated that *"it comes back on centralizing on a theme of making sure everyone feels like they have a voice, they're an important part of the team and are empowered" (pg. 16).* When a decision could not be reached immediately because of disagreements—either philosophical or practical in nature—Zachary found it useful to continue the dialogue by planning for further engagement opportunities, listening to voices of concern, navigating conflict, using evidence from the literature, and consulting others in the field on the issue. Nevertheless, *"at some point, you've got to make a decision" (Timothy, pg. 30)* to move forward. Leaders needed to be prepared for such times, too. Emma also suggested that there was a time and a place for making quick decisions without too much room for wide-scale consultations, especially in time-sensitive matters. This was in line with the approach Hannah described in a crisis situation, when action and quick thinking were preferred to lengthy dialogue. Thus, leaders are required to recognize the type of decisions to be made, what stakeholders to include in the process, and the timing to decide on how to move forward.

Although participants stated that a leader should not aim to please everyone, overall, poor decisions that were one-sided, made without consultation, forced, or favoured the majority were considered acts of bad leadership. When these decisions were related to changes in job responsibilities, they were perceived by participants as disheartening. Some other poor decisions were related to stifling initiatives, taking opportunities away without apparent reason or explanation, or not allowing people to continue their work and see better results. When talking about decisions related to

teaching, it was a general sense that "good teachers" were resourceful and would find ways to be successful in almost any circumstances. However, some decisions that senior administrators made without input from teachers were considered as being short-sighted, disregarding teaching expertise, and ultimately, having negative impact on student learning. Participants considered that decisions related to teaching practices were best made in consultation with teachers and with the students' best interests in mind. A lack of consultation led to frustration and disappointment or created a sense of not being valued. It looked more like forced compliance. Two participants also mentioned that the lack of leadership support left them feeling isolated or silenced in their advocating for students or exploring solutions to important teaching issues, which aimed to create more meaningful experiences for students.

People need to gravitate toward something—a common goal to bring them together. This is part of leadership. Otherwise, tensions, resistance, and dominant voices would arise. An attitude such as the one observed and described as *"I am the leader, I make the decisions. I want to look good, I'm a strong leader. I don't need help, I can make this decision." (Spike, pg. 12)* was often detrimental to reaching decisions that would benefit stakeholders. When there was lack of rapport or transparency or when the leader was unapproachable, people seemed to

> become afraid to make decisions because they don't know how they're going to be taken, whether the leader is going to be impatient or just not providing any guidance, [or] become angry when something is not done to the way they think it should've been done. (Alex, pg. 4).

Decisions are not perfect. They seemed to be the best choice at one particular time. Hence, leaders need to be adept to making difficult decisions and be open to revisit these decisions. The hardest decisions to make were those when no matter what the decision was, "*there's no winner [and someone will be] mad at you*" (Avery pg. 10). Other participants reflected on some of their own decisions even long after they made them and considered other possible outcomes. The two examples below show this:

> I still don't know if that was the right decision. It was the decision I made, and you are sometimes just caught between and rock and a hard place. Whatever you decide, somebody is going to be upset, and you have to develop a thick skin. (Hope, pg. 32)

> I could've handled it differently, I suppose, and tried to engage more widely, but at the time, it seemed like the best thing was to not rock the

boat and not be noticed. You can get a lot of things done if you don't care who gets credit for them and if you don't seem to be upsetting anybody else's area. (Jake, pg. 8, 9)

Decision often lead to change, which is the focus of the next subsection.

Change

Change was another leadership task that emerged from the dataset. Culture was perceived by some participants as foundational to change. For example, experiencing "a culture of mistrust and isolation" or "a culture of fear" might prevent people from engaging in change processes. Margaret exemplified this when she said that

resistance to change and moving forward comes from being in cultures that have suffered possibly minor crises that caused people to just create barriers when they don't feel cared about, they don't feel supported. It creates a culture of mistrust and isolation. (pg. 15, 16)

These barriers are hard to break. Issues related to resistance to change, lack of responsiveness to the need for change, as well as low performance benchmarks were perceived as hindering change.

Several participants discussed difficulties in implementing change when there were deep-seated beliefs and behaviors within teams or organizations. For example, when sharing his experiences of implementing change without having positional authority, Jake recalled his supporters as well as those who made sure *"I was very aware of the class distinction" (pg. 11).* Some other issues hindering change detailed by Shirley were lack of process, false impression of *good*, no accountability, poor work ethic, and making rushed decisions without regard for long term consequences. Analyzing participants' stories showed that engaging people, helping them understand the situation, and designing processes and procedures rooted in theory and *"sound and rigorous research […] rather than just practice" (Shirley, pg. 20)* helped in implementing change. Empowering people to do their job and helping them be accountable in high-autonomy environments posed difficulties. For example, Jesse often reassured his team that he was there to support their work and that their work made a difference in students' lives. Participants often referred to the importance of envisioning the future rather than remaining stuck in the present or focusing on the past. This approach in itself was conducive to change and often, to cultural shift.

Leadership is an evolving process. Not only did participants change as leaders over the years, but what was perceived as "acceptable" leadership changed, as well. In sharing early career experiences, Spike mentioned how "shocked" he was to observe leaders abusing their power and Noah described "the lack of leadership" in approaches such as *"do or die, command and control, you're worthy or you're not, if you're a superior, you are somebody and everyone else is lesser" (pg. 5).* Maggie reflected on an early career incident when her leadership approach was challenged. This instance provided key learning for her and influenced how she perceived leadership later in her career. As participants' experiences shared in interviews spread over several decades, overall, there were changes in how leadership was conceptualized over time. Maril said that leadership was *"no longer that role of being the authority. It's no longer exercising leadership by virtue of your power and status" (pg. 11).* But the good and the bad forms of leader(ship) seemed to co-exist in any era. Also, major changes in education seemed to take a long time. Joy highlighted that changes took "about a decade" and "*the larger the institution, sometimes, the longer things take" (pg. 14).* When talking about important changes in education and long-term effects, Jake reflected on his experience and said that *"some of these battles are only being resolved now. But maybe it couldn't have happened much faster than that anyways" (pg. 8).* Thus, in change processes, timing, patience, and persistence were vital.

Several participants also mentioned change as it related to new programs or initiative requiring recruiting for new roles, building a new team, forging relationships with stakeholders, proposing or managing budget, technology, and strategically planning the work. Shirley stated that before making major changes with wide impact, a new leader needed to step back, gather the information, understand the organization, and find out people's strengths. This way, people's roles could be discussed and decisions could be made, so that everyone is involved in change purposefully. Change proposed or implemented too early might spark reactiveness, frustration, or disengagement. Frequently, engaging in leadership processes such as the ones described in this subsection involved taking risks. The next subsection presents some aspects related to risk taking in leadership, as described by participants.

Risk Taking

Risk taking was another leadership task emerging from participants' interviews, closely related to the other ones presented in this section. There were times when participants took on bigger roles to seize opportunities for change with wider impact. They found that often, yet more likely in politically-charged situations, there was fear, hesitancy, and reluctance in being authentic or taking risks. But some participants felt that taking risks and advocating for people or causes came with the job and they were not shy to do so. Some examples of risks that participants took were related to initiatives they believed in or advocating for a cause that would benefit many. Like Ernest stated, *"Leaders put themselves on the line" (pg. 4)* to protect people when nothing was done by other parties to solve an important issue. Participants often refused to merely comply or avoid acting on issues out of fear of consequences even if the risk could be "almost career ending". They would dare go "where others wouldn't". In fact, there were several examples in interviews in which participants or actors in their stories faced disapproval, complaints, opposition, or even lost their job because of taking "huge risks". Other times, there was success.

Some participants talked about the excitement of "creating something from nothing", which involved taking risks. At times, though, in the incipient stages of new initiatives, *"it seemed that anything that anybody did that hadn't been done before was a source of outrage for somebody" (Jake, pg. 7).* Spike talked about how *"the first time [implementing a new initiative] happened, some people were shocked" (pg. 9)* because it involved changing the way things had been done. But Victoria mentioned the importance of courageous pioneers in moving forward on such innovative pathways. What helped leaders when stepping into a "space of risk" to achieve success was preparation, collaboration, support from other stakeholders, "going the extra mile", developing strategies to navigate processes and hierarchies, taking a respectful stance, and *"an invitation to have a different conversation" (Maggie, pg. 12).* Leaders set the tone and an example when taking risks to protect or advocate for others. In these risky situations, *"you have to have courage as a leader" (Hope, pg. 15)* even if it meant sacrifice:

> Had I been more worried about my job than doing the right thing—because make no mistake if it didn't go well, I was going to be the sacrificial lamb [...]—and I thoroughly understood that. Had I been intimidated by any of that and not done it, who knows? [list of negative outcomes. Instead,] it was quite a success. (Hope, pg. 16, 17)

So, sometimes we have to make choices that aren't particularly palatable and are somewhat risky [like] speaking out when we believe something is wrong. Hopefully, we don't have too many of those, and hopefully we have other ways of dealing with these challenges. As a leader, that's part of it. As leaders, we also need to find ways to resolve [such serious] problems. (Avery, pg. 12)

Summary: Five Leadership Tasks

Although not an exhaustive list, there were five primary interrelated leadership tasks that emerged from the dataset: relationships development, culture building, decision making, change, and risk taking. Relationship building meant connecting with people, helping them develop, supporting them in their quests, providing feedback, and cultivating mutual trust and respect. Building meaningful relationships took time and effort, requiring thoughtfulness, adaptability, and willingness to learn and listen. Building or rebuilding culture was a lengthy process, as well, and involved persistence, fostering momentum for change, and transparency. For participants, nurturing a culture based on meaningful relationships, openness, and respectful disagreement was conducive to making good decisions and move initiatives forward. They emphasized patience, inclusiveness, and consultation as pillars of reaching goals. Change was perceived as directly connected to the previous three leadership tasks. The focus on the future and the positive outcomes of change was helpful in moving toward accomplishing goals. Oftentimes, leadership involved taking risks. Even though participants acknowledged that some leaders were not equipped to take risks, others perceived it as a part of leadership and were not afraid to take action and advocate for a cause or for people.

As seen in this section, these five leadership tasks are interconnected, build on one another, and it is challenging to discuss them separately. However, understanding them as being central to leadership helps with forming the picture of what leaderships was for participants and what implementing these tasks entailed. They often came with struggles or successes, and the next section draws the attention to some of the struggles and successes that participants talked about in their interviews.

4.5.4. Struggle and Success in Leadership

Alex emphasized that leaders constantly struggled and "*are constantly faced with new challenges and it's always hard to lead people when there is a challenge*" (pg. 10). This section focuses on struggles and successes related to leadership that participants

shared in interviews. Some of these struggles and successes are also integrated in other sections of this chapter and I included them here to provide more clarity to specific issues that participants mentioned. The struggles that emerged in participant interviews are presented in this section along with approaches taken to overcome them. These struggles were related to lack of leadership training and experience, change management, engaging stakeholders in shared initiatives, new leadership, vision misalignment, experiencing "bad leader(ship)", and other issues that leaders encountered in the workplace. Participants deemed learning from struggles and negative experiences as success, which is the focus of the latter part of this section.

Leadership Training

Some participants shared their struggles during early careers or in new leadership roles related to lack of leadership training, experience, or support from organizations to deal with complex situations. Amber's story below showcases some of these struggles in a new role:

> I was seeing such dysfunction, such unprofessional behaviour by people who are professionals, and [I felt] really at loss of even understanding how to help with the situation… I felt quite on my own, I didn't feel there was anyone at the district level that had the ability or the understanding to help with that, or even understand where it had come from and why it had come to that point to start with. (pg. 16)

This lack of support and experience could be hindering leadership.

In some participant stories, tensions arose when dealing with complex situations, which had wider impact and involved one or more issues such as conflict of interests, financial loss, recruitment and retention, or disengagement. Other specific struggles brought up in interviews were related to serious issues in the workplace such as bullying, harassment, favouritism, grievances, promotion, and absenteeism. Participants found that reflecting on the various facets of a situation, consultations, and making informed decisions helped remedy these challenging situations. Also, they talked briefly about issues related to tensions between subcultures within organizations, "hosting diversity", expectation "to quantity the unquantifiable", inflexible boundaries related to what actions one could take part in, power struggles, and setting someone up for failure. The struggles mentioned here were common in formal leadership roles. Participants shared

how support from institutions and from their peers or teams helped mediate such issues and find viable solutions.

Change Management

Struggles were identified in change management. Change was often received with resistance and perceived as *"too much work … too hard" (Spike, pg. 7)*. What worked best in Spike's case was helping others see the goal, challenges and opportunities, as well as helping them understand the process and persuading them to be part of the process. His approach was in line with processes described by other participants. As emerged from these experiences, leaders needed to help their teams find their purpose and their passions to engage in change purposefully. For example, Amber described teachers in a new school she worked at as "lost": *"They didn't really know what they wanted. They knew what they didn't want" (pg. 17).* It was her role to help them figure out what "they stood for" and create a better environment to work on a shared vision.

Some participants also shared stories about having to convey difficult decisions to their teams. The most difficult times were when leaders had to convey organizational changes initiated with *"no consultation and no warning… just an announcement" (Joy, pg. 12).* These times were even more difficult for informal leaders, who had no say or power to change the course of action. In such situations, formal leaders felt caught between institutional purpose and how their teams perceived such decisions, the leaders' role in the decisions, and how the changes affected work. In a case like this, Joy tried to keep her team calm and encouraged them to remain focused on the positive outcomes of the situation while *"acknowledging some of the challenges of the unknown" (pg. 13).* What helped navigate these complex processes and reach some positive outcomes were giving time to the team to process and prepare for the change, support and resources received from the organization, and advice received from their mentors.

Multiple Stakeholders

Liaising with multiple stakeholders within or across organizations was challenging. In this process, there was a need to continuously build relationships, gain support in moving forward, and find viable solutions to unforeseen changes. Victoria emphasized that

getting the buy in can sometimes be part of the challenge. But I think the bigger challenge is that people are just overtaxed with their jobs [and] don't really have the time or the energy to do one more thing. There's also resistance because sometimes, people don't see how [a new initiative] relates to their discipline. (pg. 16)

I was wondering while listening to Victoria's story whether cultivating curiosity about a novel initiative before taking steps to implement it would have different outcomes.

Other important issues brought up by participants in engaging stakeholders were dealing with competing interests, policy changes, and constant changes in community needs. For example, Maril highlighted some struggles in the context of community engagement such as power dynamics, mediating allegiances and loyalties, boundary blurring, and competing with other educational institutions that offer similar services. She stressed that *"the same thing that creates the opportunity also creates a challenge" (Maril, pg. 13).* In these instances, she found that it was helpful to focus on finding ways to work together by delineating programs and implementing these programs in respectful ways while being mindful of other's purpose.

New Leadership

A struggle described by participants was related to new leadership. When participants themselves were the leaders departing, they reflected on what or if they could have done anything differently to prepare the team to better respond to the change. Maggie described such an event: *"the space was still fragile enough that it couldn't flourish without constant attention, care, and feeding. [It felt as if] something organic died" (pg. 21).* Hence, the role of the new leader was to understand the new context they entered and their team, along with assessing what could be continued or changed. Maggie also mentioned an important point related to the benefits of planning for a longer transition between leaders, which would allow for meaningful conversations about the environment, underlying beliefs, workflow and new ideas, and the rationale behind possible changes. New leadership was perceived as delicate, requiring adaptability and openness on both sides to allow for expectations and needs to be thoroughly discussed and realistically assessed. Other times, new leaders encountered difficulties in balancing responsibilities related to leading their team and responding to other institutional demands. The instances when a balance was not maintained were problematic for participants. In participants' view, unless handled with care, changes in

leadership could have repercussions on team dynamics, productivity, or even result in *"exodus of people" (Ernest, pg. 25).*

Vision Misalignment

Timothy shared how changes in priorities and government funding facilitated the implementation of new initiatives, which supported the overall student development. But other participants shared that sometimes, with new leadership came new priorities and vision, which negatively affected funding or progress of initiatives. Such clashes in perspectives and attempts to lead without centrality of context resulted in "a lot of destruction" with long-term effects. Specifically, some brought up funding cuts and project hiatus because, as Margaret stated, new leaders *"didn't believe in what we were doing" (pg. 3).*

It also seemed that clashing visions between a leader and their team or within a leadership team caused issues as small as dysfunction within the team or a rift in an organization. As Noah stated, challenges could be daunting, and they often don't come alone. The biggest struggles for him were *"when I have clear sense of what's doable and feel like there's a consensus and when there are overt forces pulling against that success or that potential success" (Noah, pg. 18).* Although the challenges experienced in various leadership roles differed, his approach to overcoming them was perseverance: "*stick with it! Keep your eye on the prize and then, move forward incrementally every day, and you can get over those challenges and the next challenge gets that much easier" (Noah, pg. 19).*

What I also found interesting was the description of tensions that occurred when leaders and/or followers had different expectations or preferred approaches to leader-follower interactions. For example, Timothy contrasted the innovative to operational leadership approaches. He described how some followers preferred structure and step-by-step instructions (operational) to being pushed in a space on uncertainty, where ideas surfaced and took shape over time or in unexpected ways (innovative). Considering others' experiences, these issues may also be related to one's career stage. Timothy also conveyed the idea of seeking to incorporate diverse approaches within a leadership team for better outcomes. There was a perceived risk of ending in chaos when all leaders were visionaries or hindering innovation when all were operational. Emma, in contrast, stressed the importance of more cohesive leadership teams to move forward

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on accomplishing a vision. Finally, Jake commented that sometimes, people became comfortable with a leadership style and did not see the need for change.

Dealing with "Bad Leader(ship)"

Dealing with "bad leader(ship)" was another struggle that participants highlighted. In general, for participants, top-down leadership approaches, lack of action, and decisions made without consultation were perceived as struggles. When participants experienced new and "bad leader(ship)" concurrently, the struggles were harder to navigate, and participants often transitioned to another role, organization, or sector. For instance, Hope reflected on such transitions and said: *"a good leader doesn't just point to the problems of the other person (pg. 25)* but finds their part in what led to that situation*. Mercedes also commented that her experience was "*ironically, … a blessing in disguise" (pg. 33),* leading to successful career decisions: "*I think I might still be there and not having this conversation with you, and not meeting the great people that I met [later] and not understanding education in the bigger picture. (pg. 33).* More examples of struggles with such approaches to leadership were presented earlier in the chapter.

Issues in the Workplace

Some participants in formal leadership roles shared struggles they encountered with employees who were disrespectful, challenging, or had poor work ethics. These situations resulted in workplace issues and were taxing and emotionally charged for leaders, too. Shirley stressed that when a leader has "*emotional stuff going on [in their life], it is not a good time to engage in performance conversations with team members that [they] know are going to respond negatively" (pg. 4).* But the most difficult times would be when both the leader and the follower go through challenging life experiences. Remaining calm, respectful, and taking *"the high road" (Alex, pg. 9)* when dealing with such conflicts seemed to have helped although these challenging situations might take their toll on leader's well-being. There were also several leadership tasks participants mentioned that were more on the administrative side, but which could pose issues if handled inappropriately: assigning workloads, promotions, overseeing budgets, and curriculum changes. More details about these tasks are embedded throughout this chapter.

Becoming Better Leaders

Although in general, participants talked considerably more about struggles than successes in their interviews, often, these struggles turned into successes because of the lessons they learned. Such examples and how they affected participants' leadership presented in this subsection are: opportunities for growth, dealing with failure, corrective action, and organizational support. In outlining these examples, I aimed to add to the overall picture of leadership by looking for what participants identified as success, along with valuable lessons learned from negative experiences, strategies used to overcome those challenges, and their outcomes.

To begin with, a focus on growth opportunities increased engagement, retention, and innovation in the organization. It also seemed that whenever participants received support from leaders on their career journey, they perceived it as success. But Victoria shared her concern with leaders not prioritizing employee's development:

> I see a lot of people working in higher education that are doing jobs that don't inspire them. And it's unfortunate because, if we were able to see what their strengths were and kind of play on those strengths, they might have more satisfaction but also more productivity. (pg. 19)

Shirley considered helping others develop and *"move on to things that were better for them" (pg. 18)* a big part of her success as leader. Also, opportunities for growth aiming to equip teachers "to do more for the students" were considered empowering. In such a process, Jesse said that as a leader, he *"empowered them [teachers] through trust" (pg. 8)* and helped build "a strong culture".

Furthermore, several participants shared stories about difficult lessons of leadership when their confidence was shattered, usually through failure or what was perceived as failure such as job loss; conflicting visions between leaders and team or senior administration; meeting with unrealistic expectations; or struggles with leadership. These situations were presented in detail earlier in the chapter. It is worth mentioning here that they turned in successes because of the lessons learned from them. For example, reflecting on their experiences with disappointment and failure, participants were able to identify the causes of their struggles, learned to be patient and perseverant, found ways to rebuild their confidence and regain perspective, as well as continue to search for more meaningful opportunities. In their endeavours to make a difference,

changing careers or organizations turned out to be a better fit. As well, participants learned from their own struggles with leadership how to be better leaders themselves.

Moreover, it seemed that when leaders did not act on issues affecting the workflow or morale of their team, it forced the team to deal not only with the issues themselves, but the consequences, as well. Johnny shared that he learned from such an experience to distinguish between a leader's oversight and their not acting on issues on purpose. He was also able to understand that the reasons for a leader's lack of action where often political. Analyzing similar situations, Hannah stated that often, leaders did not act because they were afraid of negative consequences. In her view, many times, acting on issues meant taking risks. But because outcomes were not always predictable, chances were that taking action would resolve the situation whereas not taking action could have more damaging consequences. Similarly, Mercedes shared that she encountered suspicion, lack of support and engagement, and push back from senior leaders on a proposed initiative. What helped navigate the situation was open communication, analyzing different facets of the issue, and showcasing that it was not about *"provoking people to be angry, or scared, or fearful" (Mercedes, pg. 22).* Along these lines, Sunny shared a story from corporate when he had to advocate for his team to a senior corporate leader who displayed not only lack of interest in the work but had a different vision and was unhappy to be confronted. Sunny considered this experience as a "test of fortitude", saying that if unsuccessful in advocating for the team, *"I was going to be done as a leader for them" (pg. 16).* He was successful in the end and learned how powerful persistence and making informed decisions were in this process.

Mercedes shared experiences where leadership was counterproductive by limiting possibilities and creating dissent. But she also told me about an experience about a successful initiative, when she collaborated with a colleague to help minimize the students' skills gap in a subject matter and provide them with interdisciplinary experiences. Such success inspired her to try again and helped her understand how such innovative initiatives benefited student success. In describing strategies for improvement of the workflow and the processes within his organization, Jesse listed creating identity, fostering a culture of learning and growth, and offering constant support. Sometimes, a leader also needed to do "*a lot of fixing and bring the teachers into a new era of education" (Jesse, pg. 8).* The point of leadership for him was to help others become better leaders themselves. Other participants also shared successful

stories about creating opportunities and providing support for informal leadership and innovation. One of them is Zachary, who said:

> I think those types of outcomes and innovative strategies [corresponding to a specific issue], as rich as they were, [they were successful] only because we went away as a team—together and to a physically different space—we protected time for it, and everyone was given a chance to speak their mind. (pg. 12)

This example shows that focus, dedicated time, a suitable environment, and structure to allow collaboration helped with the success of new initiatives. As emerged from participants' stories, leadership is about people, building relationships, and developing culture. Thus, careful attention needs to be given to creating positive experiences for people and an environment conducive to learning and growth. Reflecting on her leadership journey, Margaret highlighted:

> one of the biggest things that I learned, when I think back to the whole piece [i.e., leadership], is how people hunger for that work and play existing in a culture that is supportive, that is caring, that allows them to grow and flourish and continue this ongoing growth […] What people really want is that support and care. And almost every human being I've ever run into, once they have that support and that care they were searching for, they move forward and start to create change. (pg. 15, 16)

Perhaps endeavouring to create such environments is the main purpose of leadership.

Summary: Struggle and Success in Leadership

Participants shared multiple struggles and successes of leadership, some of which were described in this section. For example, lack of leadership training or experience seemed to leave leaders almost helpless in dealing with the complexities and challenges of leadership related to misbehaviour, political tensions, and issues related to change management and decision making. Initiatives that required the involvement of multiple stakeholders were challenging too, often because of competing demands, priorities, and expectations. A major struggle that participants shared was dealing with "bad leader(ship)", particularly when it was coupled with a change in leadership. The change in leadership was not an issue in itself, but a vision that conflicted with or hindered initiatives that were already in progress. Top-down decisions seemed to disempower people. When struggles provided participants with opportunities for learning, they turned into successes. Such successes were related to the impact leaders

had on others' professional and personal growth, developing perseverance and resilience by dealing with failure, and creating opportunities for growth and innovation within organizations.

4.5.5. Section Summary: Leadership Implementation

A large part of the interviews focused on aspects related to leadership implementation. From participants' perspective, leadership was highly contextual and similar situations often needed to be approached differently depending on the context. Hence, participants stressed flexibility and adaptability in moving forward processes, as well as creating space for difficult conversations and decisions with long-term results. Although leadership was mainly associated with formal roles, it emerged informally, also. Participants often highlighted the differences between old and new conceptualizations of leadership. As it emerged from analyzing their stories, newer approaches seemed to have better outcomes in education, as they involved collaboration, negotiation, and involvement of stakeholders in decisions making processes.

Additionally, participants perceived education as altruistic work and often chose to work in this sector because they wanted to make a difference. Educational leaders were considered culture changers and community builders. There were three primary foci of educational leadership that emerged from participants' stories—students, teachers, and community—yet the overall purpose of education was to offer all students with meaningful experiences. Another theme related to leadership implementation that emerged from the data was related to five leadership tasks: relationship development, culture building, decision making, change, and risk taking. Relationship building was perceived as playing a fundamental role of leadership. A positive culture seemed to be conducive to good decisions and facilitate achieving goals. Dialogue and engagement of multiple perspectives were deemed as having the best outcomes because these outcomes would benefit many. The role of a leader in change processes was to create an environment where ideas were gathered and discussed without fear of being judged or reprimanded. Leadership also meant taking risks, at times.

Participants shared that they learned from both struggle and success, yet the former seemed to offer more memorable lessons. Leadership implementation was the most prevalent area in the dataset. Aspects of leadership implementation surfaced

throughout the interviews, not only in answers provided to the specific questions on the topic. Due to its complexity, it was also the area that took the most time to reflect on and refine in the data analysis and interpretation processes.

4.6. Leadership: The Unexpected

Some unexpected findings that emerged from analyzing the participants' stories were related to *Organizational Renewal and Retention* and *Systemic and Organizational Barriers.* They were unexpected to me because I did not ask direct questions pertaining to these topics. Although I thought some participants might talk about these issues, I did not expect them to be of such extent. This section presents these findings and how they may support or hinder leadership.

4.6.1. Organizational Renewal and Retention

An idea that emerged from the dataset was about organizational renewal and retention. A large part of the data related to this theme were about parting with an organization, followed by hiring practices.

Parting with an Organization

People seemed to "leave jobs" when there were no opportunities for growth in their current organization, because of feeling "stuck", poor leadership decisions made with wrong intentions or interests, or due to life events. Often, changing jobs for career advancement was perceived as positive. However, there were some aspects related to people's parting with an organization or role because of leadership. For example, people left because they felt that their leaders did not value them as individuals, their potential, or their work. As well, they left jobs because of changes in leadership or in organizational structures. In these cases, new leaders either had a different vision, did not deeply understand the organization and its context, or were more concerned with their "own image" and how they could prove themselves rather than what they could build on for the betterment of the team or organization. But when participants were the new leaders, they often talked about their leadership experience and training helping them be mindful and supportive of others and understand the nuances that new leadership had.

Furthermore, some other motivations to leave were experiencing favouritism in the workplace, misalignment in terms of value system, and poor work conditions. When participants talked about someone being "forced" to leave their jobs, it was either because of "bad leader(ship)" or termination of employment. Some direct references to why participants left employment were:

> When I look back at why I've left organizations it's typically because I've lost, I would say, respect for the leaders. (Sunny, pg. 9)

> I think one of the challenges in leadership and leading is sort of knowing who I am and knowing what I can do and what I can't do, and who I work with and who I can't work with. Because the value system has to align; otherwise, I'm out. I won't be a part of it. (Hannah, pg. 38)

> [It was] very stressful, very nerve-wrecking. It's very toxic. You have no opportunity for growth […] or to provide any input. […] I was very unhappy going to work. The money wasn't worth it. (Emma, pg. 10, 11)

> Why would I work in these [unfavourable] circumstances? (Jake, pg. 11)

More generally, participants talked about their observations of others' leaving jobs or organizations because of lack of opportunities for growth or suitability to the role:

> They don't have a space to think and they can't get themselves heard about the developmental opportunities that they're seeking. (Maggie, pg. 21)

> You see it all the time with the people that you work with, where there's not a good fit for them and so we see their performance. We see their stress levels elevated and their performance is lower. They're disengaged and when things end for them, they will often have the opportunity and find themselves in a role that's a better fit because they are now driving that. They have a chance to make that change. (Ernest, pg. 25, 26)

Hiring Practices

Participants mentioned hiring practices in their interviews. Emma, for instance, believed that streamlining hiring for formal leadership positions to include interpersonal skills assessments would help alleviate issues of power, which could be detrimental to the well-being of those who were not in a position of power. Additionally, some participants appreciated hiring people who complemented each other in terms of level of skills and expertise to allow for infusion of ideas and innovation. One participant shared his disapproval with current hiring practices for senior administrative roles, which

seemed outdated and needed to be adapted to address the newer complexities of changing institutions. As well, establishing senior leadership teams considering only expertise required to address the short-term needs or mandates of an organization might have long term repercussions. In addition, Johnny emphasized that competition with other organizations posed difficulties in recruiting and retaining skilled faculty. Along the same lines, Maril talked about the need for organizations to adjust hiring practices to allow recruitment of younger populations and her efforts in the development and retention of human capital in the organization:

> we will need to enrich their educational experience and their work experience through education. So, I'm being very much focused on encouraging professional development that expands their skills set and ultimately, we'll have other positions they can apply for in the organization. […] We may have someone in that role for a shorter period of time, not people who are lifers, who may be committed to the organization for 15-20 years now. But we may have people for 3-5 years really invested and protruding. We'll also be nurturing and supporting their skill development and their educational development to pursue other careers and other job opportunities, hopefully within the organization. (pg. 14)

From what participants shared in interviews, organizations often struggle to recruit and retain employees. Thus, it is often required that organizations implement strategies to increase their human capital by motivating their employees, creating opportunities for new skills development, and commend the value they bring to the organization. These strategies do not guarantee retention, though. What may also help is for leaders to be continuously involved in these processes and exercise "good leader(ship)", as described in this study.

4.6.2. Systemic and Organizational Barriers

When talking about the role of education, Jake referred to preparing students from the perspective of *"what's good for society" (pg. 22).* This section provides an overview of barriers that people working in education face in accomplishing their mission, related to access to education of non-traditional students, biases and stereotypes related to leadership, and resistance to change.

Access to Education

The education system, in general, was perceived by many participants as very structured and more suitable to traditional students. Lack of flexibility hindered access to education for non-traditional students. Working with marginalized groups and vulnerable populations was brought up as priority by participants in all sectors included in this study. This may suggest a priority in designing pathways to ensure that all people have access to opportunities that warrant a decent life. Participants talked about systemic barriers not only across education, but healthcare or politics. It seemed that there were similarities across organizations or sectors related to decision-making, risk taking, and advocacy. Specifically, participants who shared experiences from K-12 sector stated repeatedly that the primary role of educational leaders was to help teachers find better teaching strategies and understand their role in improving student learning. In PSE, the issues were more diverse and such, there were a variety of systemic and organizational barriers that participants shared. Some systemic issues that non-traditional students encountered in accessing education were related to unrealistic expectations, good intentions but wrong actions, inadequate resources, different standards based on social or ethnic background, and cultural barriers. Some expressed feelings of frustration and disappointment with the devastating consequences of complacency and not acting on systemic barriers to students accessing education. Specific examples of such barriers were interwoven in presenting the findings of this study. On a larger scale, political landscape seemed to impact everyone's work. Participants referred to strikes, negotiations, competing priorities, and government funding changes, which affected projects, programs, of jobs.

Biases and Stereotypes

A few participants mentioned biases and stereotypes about leadership, which seemed to be accepted or promoted by society. These were somewhat visible in transfers between sectors. Participants who went through such transitions mentioned that "branding" might hinder either entering or being perceived as "effective" in another sector. As well, two participants mentioned gender-biased employment and expectations. When it came to biases and assumptions about leadership, functioning within the old paradigm seemed to be the biggest struggle even though this struggle might have also been related to contextual factors and lack of exposure to the wider perspective of the field. In discussing cross-discipline or cross-functional endeavours,

participants referred to the perception of "lower" value or status of leaders who might not "fit in" within expected stereotypes. I was wondering while reading the stories or comments if "status" was real or perceived. Either way, by not acting on these types of assumptions and stereotypes when they surface—at least to gain understanding of the situation—they may continue to exist.

Organizational or Systemic Change

Perhaps one individual cannot do much by themselves. The barriers emerging within organizations, professions, or society, in general, may prevent one from taking action. It appeared that leadership development programs such as the ones that participants in this study pursued offered opportunities to be exposed to and learn about different theories of leadership and how they may be applied in practice. The doctorate seemed to broaden one's perspective and understanding not only of their preferred framework, but others', too. Nevertheless, this higher understanding of a few may not be enough for wider change, either organizational or societal. No leader works in isolation or administers all structures within their organization or profession. Therefore, others need to come along on this journey of change.

Some participants referred to education as a place to bring people together and open the dialogue by integrating different perspectives. Timothy highlighted that the lack of such interactions may result in further division and marginalization. But some participants mentioned struggles posed by existing organizational barriers or in working with people who conceptualized and developed leadership in more predictive, transactional ways. Although it was beneficial to help others see value in newer paradigms of leadership, tensions seemed to arise when people lacked the willingness to learn or change. These tensions hindered innovation, especially when it was coupled with inappropriate organizational support for grassroots initiatives. *"Can't there be more candles? Am I asking for too much? […] two, two more candles!" (pg. 20),* Mercedes asked when describing such struggles. In participants' perspectives, leadership played a big role in addressing these systemic and organizational issues and common efforts were needed to consistently identify and overcome these issues.

4.6.3. Other Findings

Participants briefly brought up issues that were not probed in interviews, such as differences between educational systems across North America or more specifically, differences between provincial systems in Canada; maintaining organizational distinctiveness; diversity in leadership teams as it related to one's cultural background, gender, or personality/workstyle; and the outcomes of inadequate leadership preparedness of educational leadership teams. Although these topics could contribute to the understanding of the leadership phenomenon, they were considered outside the scope of this study and are suggested as focus for further research on leadership.

4.6.4. Section Summary: Leadership: The Unexpected

An area of findings of this study was related to insights that I did not expect to find in the data to the extent of emerging as a theme on its own, such as organizational renewal and retention and systemic and organizational barriers. In terms of organizational renewal, participants argued for hiring strategies that would alleviate power struggles and poor leadership practices. Related to transitioning to another job, organization, or sector, participants talked about their own transition being motivated by career advancement opportunities and in some cases, experience with "bad leader(ship)". When leaders encountered systemic or organizational barriers, they found themselves advocating for marginalized populations and taking action to help eliminate barriers that prevented some students from accessing education. As it emerged from this section, leadership did not affect only the immediate context it was exercised in. Most likely, leaders in education would engage in collaboration with other stakeholders to initiate wider change.

4.7. The Facets of Leadership: Integrating the Findings

Leadership arises in complex situations and considering the leadership domains and dimensions as separate entities, though important, would not provide the complete perspective of leadership. This section aims to provide a synthesis of the study findings, which were presented in detail in this chapter so far. It is meant to paint an overall picture of leadership as found in the practice of leaders, as well as establish a bridge to the Discussion Chapter, which focuses on ways the study findings relate to existing

literature and how they support the answers to the research questions. As mentioned in Chapter 2, when presenting the conceptual framework design, the three Leadership Domains showcase the spheres within which leadership occurs. These domains also mirror the major shifts in how leadership has been defined and described in existing literature. Primarily, these domains helped me make sense of the conceptual research and identify aspects of leadership theory to look for in practice. Furthermore, the two Leadership Dimensions showcase the applied side of leadership, in terms of how people develop and exercise leadership, which was the reason behind their guiding the data collection and analysis.

Conceptually, the three domains build on one another, with the individual domain as foundation to one-to-one and multidirectional interactions. The two leadership dimensions are closely interconnected in practice. Often, engaging in the exercise of leadership provides some of the most valuable lessons for leadership development and vice-versa. If leadership development involves reflective learning, then leadership implementation entails reflective practice. Considering this rationale and the role that each component of the framework plays in understanding the leadership phenomenon, this section aims to show how, based on participants' stories, the concepts emerging from practice and theory interconnect. The section focuses on several central ideas of findings related to how participants developed their leadership and how they strived to implement their learning within the three leadership domains.

4.7.1. Leadership Development Dimension

In this study, leadership development referred to how people developed their leadership skills and behaviours. Although it may appear that this Leadership Dimension involves only the development of leaders themselves (Individual Domain), to some extent, it also involves the development of the people whom they lead and interact with (Interactional Domain), and the collaborative environments some of their activities unfold (Collective Domain). An overview of how these domains connect with leadership development as appeared in the findings of this study is presented below.

Individual Leadership Domain

Leadership was considered an evolving process. The individual leadership domain refers to how participants developed their leadership. Participants in this study

developed their leadership through a variety of personal and professional experiences; by undertaking different forms of education; and through dialogue with others by engaging in mentorship and conversations with other leaders or subject experts. Over time, through these experiences, participants' leadership evolved, and their perspectives of leadership broadened. Motivation was key in engaging in leadership. The motivation behind participants' pursuit of formal leadership was their commitment to make a difference. It seemed that the altruistic nature of education and its mission of initiating change created the perfect environment for participants to have an impact on individuals, organizations, or communities. Participants' career paths to formal leadership were usually multifaceted, consisting of undertaking various roles in organizations or working across sectors. Often, informal leadership appeared in the practice of people who engaged in grassroots initiatives, interdisciplinary projects, or committee work.

From participants' interviews, it looked like the expectations of one's leadership where higher and their approaches to leadership became more complex as they acquired relevant experience. Leadership evolved through experience as it allowed people to engage in trial and error approaches to solving problems and learn from them. Negative experiences with leadership, often associated with poor leadership practices, helped participants internalize what not to do as leaders, whereas positive experiences were often emulated in practice. As well, learning occurred frequently when dealing with internal tensions, failures, and mistakes.

Participants also developed their leadership by engaging in formal education, such as the doctoral program. Through these opportunities, they became well versed in the leadership literature and conducting research. Another way to develop one's leadership that emerged from the study was the engagement in formal or informal dialogue with others. Learning from others' experiences lead to finding new strategies for practice and promoting personal or organizational change. Mentorship was the most used form of informal leadership development. It called for authentic conversations that were conducive to mutual influence, feedback, and inspiration. Also, participants took part in non-formal education, such as workshops, seminars, and other professional development events. Reflection was one of the pillars of leadership development. It referred to exploring theoretical and practical leadership issues and often resulted in better learning and practice. Participants highlighted that they learned how to engage in

disciplined reflective processes during their doctorate and continued to apply these processes in their practice.

One of the most important findings related to leadership development was that it required engagement in lifelong learning. Leaders needed to develop self-awareness, discernment, and competencies required in addressing complex leadership issues, taking action conducive to change, and making informed decisions. Since leaders played a vital role in the development of others, building capacities to allow them to do so was essential. Some examples of skills mentioned in interviews were: communication, relationship development, decision-making, dealing with dissent, and flexibility in adjusting practices according to the context they exercised their leadership in. Taking part in various leadership activities helped participants expand their perspectives of leadership and a wide variety of competencies, which transferred across the other two leadership domains and were interconnected in how they implemented their leadership in practice.

Interactional Leadership Domain

The interactional leadership domain refers to how interactions between people occurred, how relationships developed, and the impact that these relationships had on one's leadership development. Interactions could be sporadic or long term, with peers, followers, or mentors. In the data collected for this study, participants recognized that long term relationships contributed to one's leadership development over time. Formal and informal relationships were cultivated based on mutual trust, transparency, and responsibility. In collaborative settings or in leadership tasks that asked for different types of expertise, leaders and followers often swapped roles in learning and so, the influence became mutual. Through purposeful interactions, leaders helped others develop their leadership, as well. Participants emphasized the importance of providing support, resources, and opportunities that allowed others to improve their leadership capabilities. As leadership often emerged informally, it was the leaders' responsibility to prepare others to take on these roles and initiate change.

For participants, role models were people whose practices they primarily observed. Aside from formal leaders and mentors, the role models mentioned by participants were parents, teachers, friends, or other people whom participants considered as influencing their leadership. Although role modeling may not be

considered a form of direct interaction, I included it here because it seemed to offer opportunities to engage in cognitive processes of assessing and selecting what to be modeled once observed.

Nurturing meaningful relationships in leadership required skills such as empathy, active listening, and ability to communicate and/or relate to others in order to give and receive feedback and participate in creative problem solving. Participants highlighted being considerate in approaching tough conversations and providing feedback, as well awareness of the other person's level of comfort with being vulnerable and open to change. Interactional leadership domain was an important area explored in this study. When considering leadership as influence or others' development, the quality of these interactions mattered. "Bad leader(ship)" in the form of top-down approaches or lack of support and motivation were not perceived as conducive to relationship development.

Collective Leadership Domain

When referring to aspects related to the collective domain of leadership, participants emphasized teamwork and building culture within organizations or between organizations and community partners. Cultivating a trusting environment was key to personal leadership development, mentorship, and collaboration. Leaders' responsibility was to nurture such environments. Engagement of multiple stakeholders in leadership activities, particularly in decision making, was considered helpful in reaching important goals. These decisions could be about local issues or issues with a wider impact. It looked like decisions within collegial environments could pose issues; hence, leaders needed to be skilled at building consensus and implementing collaborative processes in ways that would not hinder progress. Understanding the organizational context would also benefit in such situations.

In looking at participants' interviews, collective leadership emerged in collaborative initiatives. These initiatives required creating partnerships by inviting participation in meaningful conversations, contributing expertise, and effecting change. Educational leaders were also seen as builders of culture in their communities. Similar to relationships, culture building was lengthy and called for patience, perseverance, and respect in interpersonal communication. Building culture was not only the leaders' responsibility, but everyone's. In this process, a sense of belonging to community developed, which provided a place for people to understand how they could contribute,

discuss and make sense of their work, as well as envision the future and take action to make it possible.

4.7.2. Leadership Implementation Dimension

In this study, leadership implementation refers to how participants exercised leadership in practice. Participants perceived leadership implementation as an evolving process within the three leadership domains. The process began with their developing capacities to engage in leadership and continued with cultivating meaningful relationships and encourage dialogue. A reflective stance and critical friends often helped leaders address and subsequently avoid the negative aspects of leadership in their practice. As many examples related to implementation of leadership in practice were highly contextual, the section provides a high-level summary of how the three leadership domains interrelate with formal and informal leadership implementation.

Individual Leadership Domain

In general, participants in this study described leadership as taking place within collaborative environments. They strived for a consultative approach and engagement of people's viewpoints in accomplishing tasks. Hence, the implementation of leadership within the individual domain refers to how participants applied their understanding of leadership in practice and how they perceived their own leadership in relation to promoting others' growth.

Educational leadership was often compared to service or teaching, which implied selflessness and focus on others' wellbeing. Participants highlighted that leadership was not an easy task and they needed to be skilled at dealing with multifaceted situations in their endeavours to initiate change and address systemic or organizational barriers. They took risks and showed grit in their actions. Throughout the interviews, leadership was associated with learning. The implementation of one's leadership within the individual domain refers to being reflective practitioner. Engaging in reflection helped leaders assess issues in depth and the lack of reflection was perceived as detrimental. Moreover, new roles and organizations posed great learning opportunities. They required participants to adapt constantly, be flexible and amenable to adjusting their practices as the new context or situation required. Appropriate training and experience were perceived as helpful in adapting to new contexts.

Leadership implementation within the individual leadership domain also refers to a leaders' understanding of the role they play in accomplishing goals and their responsibility to help people and organization move forward. Having a broad understanding of what leadership was and tapping into multiple approaches to leadership as situations required helped leaders be resourceful and develop a "good practice" of leadership.

Interactional Leadership Domain

The interactional leadership domain refers to how participants developed relationships. In general, for participants, personal or professional growth occurred through feedback, advice, and continuous support. They emphasized working with others to identify potential areas of growth. Then, it was their responsibility as leaders to create opportunities and infrastructure to help others engage in learning and development. They also needed to trust others with taking formal or informal leadership roles. Although both forms of leadership were acknowledged, participants mentioned that informal leadership could pose issues related to power and opportunity to influence change at a larger scale.

Building meaningful relationships was considered key in leadership implementation within the interactional domain. Open dialogue was perceived as helpful in influencing change in perspectives and practices. While formal leadership inherently entailed interactions between leaders and followers, mentorship was predominantly built on informal relationships. Participants saw value in tapping into the wisdom of others by being mentored or giving back by mentoring others. These mentoring relationships were forged with students, colleagues, and other leaders. Mentorship took place during formal education—teaching, research supervision, and project collaborations—or in various areas of practice. These relationships offered access to a wider variety of experiences than their own, allowed for the use of accountability mechanisms, and were perceived as empowering and contributing to personal and professional development.

There were several struggles that participants mentioned related to leadership implementation, which could be related to both interactional and collective domain of leadership: lack of support from superiors, top-down decisions, unsuitable change management processes, and new leadership. In contrast, providing opportunities for

growth, learning from challenges, and creating access to education for all were considered favourable to relationship development.

Collective Leadership Domain

The collective leadership domain refers to teamwork and building culture, the completion of tasks when multiple stakeholders were involved, and strategies to engage in purposeful dialogue. This domain could be considered as cultivating a sense of togetherness, a collaborative approach, within which individuals are valued and supported in identifying and developing their full potential. A leader's understanding of the organization—people and processes—also impacts leadership implementation. Participants highlighted that the feeling of belonging to a community motivated people to contribute to developing and implementing a shared vision. Committee work, interdisciplinary projects, cross-organizational initiatives, and community partnerships took place within the collective leadership domain.

In participants' view, student experience was a priority of educational institutions at all levels. The larger role of education in society was to offer people access to knowledge, exposure to various perspectives and practices. In turn, these would effect change, starting with personal change and continuing with change at a broader level. To accomplish this mission, leaders needed to be equipped themselves first, then be able to inspire change in others within interactional and collective domain. An interesting idea that emerged was related to a leader's not being always present in the work undertaken to accomplish a goal. In this light, for both interactional and collective leadership domains, it could be inferred that a leader needed to be skilled at cultivating trust, self-reliance, and self-efficacy in others through meaningful and encouraging interactions.

Ultimately, cultivating collective leadership starts with the individual. In fact, across all three domains, the individual is an important part of leadership. Educational leadership is concerned with students, teachers, and community partnerships. Engagement of different perspectives and approaches to problem solving were perceived by participants as a way to achieving excellent results; hence, collaborators needed to be prepared to contribute their expertise. Nonetheless, participants emphasized that for these interactions to occur and have a positive outcome, the leader needed to initiate and cultivate an environment conducive to creativity, innovation, and

achieving a balance between work and play. Hence, patience, respectful disagreement, and unbiased decision making were important skills required in these engagements.

4.8. The Surprising Elements

In conducting this study, one of my goals was to collect participants' stories from a pure interest in their leadership experiences. I wanted to learn more about the leadership phenomenon and since I was going through an Educational Doctorate in Leadership program myself, I became curious about what others who pursued the same program would have to say. What was surprising to me was participants' finding the study valuable in several ways. It seemed that this study offered them another opportunity to engage in learning.

As a "researcher-in-training", the decisions made along the way and the methods used were often employed in a trial and error mode. The learning curve was steep and often uncertain. But participants—more seasoned researchers—seemed to find value in my using these strategies. For example, many participants mentioned that providing the Interview Guide in advance helped, which was what I thought, too. That was a good sign! It increased the quality of the interviews and the complexity of the stories that some participants shared in interviews. Johnny said that *"It was fun [to be interviewed.] I told you every story that you need to know, good and bad" (pg. 17).* Moreover, Mercedes stated that what she shared in the interview *"really matters to me"* (pg. 20), which gave me hope that the stories I was listening to were genuine and meaningful to participants.

Two participants said that they reviewed some leadership theories before the interview and others commented on the questions. Additionally, Mercedes said, *"I'm glad none of your questions asked for citations!" (pg. 37)* and Zachary stated that the questions I asked were different than he expected:

> When I first looked at this question, I was trying to think formal leadership theories I've learned in formal education. But then after that pathway, I realized it wasn't about the education I've received. It was about experiences I've lived through and the experiences of others, and leadership styles. What has worked in that environment with that particular leader... and perhaps, more importantly, what has not worked with other leaders in different environments. (pg. 1)

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These comments were in line with my initial concern that providing the research questions in advance and detailing the study too much in the introductory emails would prevent potential participants from taking part in the study.

When talking about participating in the study, Alex highlighted that the experience was meaningful to him because he could reengage with the topic and contribute his experience to the field: *"I wanted to share my experience because we don't have too much opportunity to do so, particularly after the coursework is finished" (Alex, pg. 19).* A couple participants were concerned with the length of their own interviews and the amount of time needed for transcription and analysis. It was rewarding to see their remembering the time they engaged in the data collection and analysis processes themselves. But the excitement I was experiencing in conducting this study coupled with my inexperience with qualitative research prevented me from seeing clearly the mountain of work that laid ahead. Only later did I understand.

An amazing amount of laughter and some tears accompanied the stories. Some experiences yielded strong emotional responses. Reflection on their leadership experiences was mainly for learning purposes, but I suppose, it was healing, too. I often noticed participants' curiosity and eagerness to find out more about other perspectives of leadership. For example, Avery pointed out the value in interviewing leaders from various leadership roles and with different perspectives, emphasizing the connection through the doctoral program, an idea that was also present in my rationale of pursuing this study:

> These are great questions! What's interesting to me is that you are approaching people in various forms of leadership, who are in some ways connected because of the EdD program, either K-12 or higher ed. I like that because we come from different perspectives and experiences and work roles. It would be interesting to see similarities and differences. (pg. 18)

Other comments showing the participants' reflection on their experience in the program, the timing of it, and this study's significance were:

> When I think about this study… so often times, people go into the program at a back-end to their career, and I wish I had taken this earlier in my career because looking back, that reflection on our leadership that the EdD program provided… it's just so valuable in terms of really understanding yourself as a leader. It was great! So, I'm really glad that you're doing this study. (Margaret, pg. 19)

I appreciate your doing this work. It's a lot of work, but it's worth it. (Joy, pg. 17)

You're on to something important. I'd be interesting to read your final thesis. […] I like to read some of the more current leadership information and dissertations. (Maril, pg. 19)

Participants were excited about the study, showed interest by asking me questions, and offered to support me on this journey. Some shared insights from their research experience, offered advice on data analysis approaches, or additional topics to be included in literature review. The message throughout resonated to Ernest's: *"I'll do everything to help you finish" (pg. 27).*

Being new to the qualitative research processes, I did not quite know what to expect. Also, with every interview completed, I felt an increasing responsibility that I write a leadership story by interweaving participants' experiences in a light that brought out the fine details and intricacies of leadership as they experienced it. Several offered to be critical friends once I went through the first stages of analysis, which they did through member checking. Not only did participants confirm the accuracy of the documents sent for review, but they commented on the review process itself as prompting reflection. They also found their voice in my writings and considered that the study would add to the understanding of leadership. Hope highlighted that sharing a story could give confidence and inspiration to others. This is what participants in this study did: they shared their stories and were eager to bring light how they conceptualized leadership and how it unfolded in practice.

To conclude, the surprising theme that emerged from the dataset presented in this section was how participants related to this study, specifically the value they found in being asked to share their experiences and the study itself. Participating in the study offered an opportunity to engage and contribute their perspectives, as well as reflect on their leadership and possibly clarify specific approaches and rationale. This was conveyed in the interviews and the engagement in transcript review and member-checking processes. Reading their responses and encouraging words confirmed my work and motivated me to continue and arrive at the point of completion. As stated before—and one of the reasons I included this section in reporting the findings—participants modeled leadership in all our interactions on this journey: willingness to

participate, openness to share, offering support, and every single story they entrusted me with.

4.9. Chapter Summary and Key Findings

Although extensive, this chapter is far from being a complete picture of leadership. By exploring, analyzing, and interpreting how 22 participants experienced leadership, I hoped to identify aspects of leadership theory that surfaced in practice, as well as to find implications for the design and development of programs aiming to prepare leaders. The several ways in which the components on the conceptual framework constructed for this study (Leadership Domains and Leadership Dimensions) interconnect present one perspective on how theory and practice of leadership converge from participants' experiences. Considering the primary areas of findings presented in this chapter—*Overall Perspective of Leadership, Leadership Development, Leadership Implementation,* and *Leadership: The Unexpected*—there were four key findings showing how participants conceptualized and experienced leadership. These key findings are presented below and are discussed in detail in the next chapter:

1) Leadership is an evolving multifaceted phenomenon
    a) Leadership conceptualization has shifted over time
    b) Leadership is about responsibility rather than authority
    c) Leadership approaches are often tailored to context
2) "Good leader(ship)" is a relentless and selfless endeavour
    a) People's leadership perspective is shaped gradually by a variety of sources
    b) The five facets of leadership: social, mental, emotional, spiritual, and physical
3) Learning, experience, and reflection are fundamental to leadership
    a) A reflective learner is a reflective practitioner
    b) Leadership practice takes shape in constant "refining by doing" processes
    c) In practice, leadership emerges formally and informally
4) Leadership is the subtle force behind the growth of individuals, organizations, and communities
    a) Leadership focuses on people, relationships, influence, and change
    b) Dialogue-enriched leadership contributes to achieving goals purposefully

Chapter 5.   Discussion

5.1. Introduction

In this study, I explored, analyzed, and interpreted how people who pursued an Educational Doctorate in Leadership at Simon Fraser University experienced leadership. In doing so, my first goal was to identify what aspects of established leadership theory, as encompassed in the conceptual framework constructed for the study, were found in the practice of educational leaders. A second goal was that, by understanding participants' experiences, I could find implications for the design and development of programs aiming to prepare leaders. The conceptual framework for this study was constructed by synthesizing a select body of literature. The framework illustrated how leadership conceptualization shifted over time, as well as the spheres and ways in which leadership occurred in practice. The framework consisted of three Leadership Domains—*Individual, Interactional,* and *Collective*—as they emerged from the selected conceptual and empirical research on leadership, and two embedded Leadership Dimensions—*Development* and *Implementation*—which focused on aspects of leadership development and implementation that surfaced within the three domains in analyzing the stories shared by participants. To collect data for the study, I interviewed 22 participants using a ten-question Interview Guide, which was informed by the two leadership dimensions. I then analyzed the dataset to uncover how participants conceptualized, developed, and implemented leadership within the individual, interactional, and collective domains. These findings were presented in detail in the previous chapter.

This chapter aims to answer the research questions and determine how the study relates to the body of leadership literature used to construct the conceptual framework. In analyzing the participants' leadership experiences and connecting them to the literature, I aimed to identify aspects of leadership theory found in practice (RQ1) and implications for the design and development of leadership studies programs (RQ2). This chapter is structured in two sections, each addressing one research question:

RQ1. What aspects of leadership encompassed in the conceptual framework constructed for this study are identified in how people who pursued doctoral studies in Educational Leadership at Simon Fraser University experience leadership?

RQ2. What are some implications of how people who pursued doctoral studies in Educational Leadership at Simon Fraser University experience leadership for the design and development of leadership studies programs (formal, non-formal, and informal)?

5.2. The Four Key Findings in Light of the Literature

This section discusses the four key findings outlined in the previous chapter in light of the literature. To find out how the findings related to the literature and identify any existing gaps, I analyzed the themes found in the dataset within the context given by the domains and dimensions of the conceptual framework. This way, I could identify if the themes that emerged from the data were also found in literature and if there were any gaps in the selected literature. At the same time, I could identify if the themes found in the literature used to construct the conceptual framework were also found in the data and if there were any gaps in the data. It is important to note that the findings of this study did not diverge too much from the body of literature used to construct the conceptual framework. This was expected since the framework guided my research processes. But it also demonstrates that my literature review was comprehensive and that my analyses were systematic. The gaps identified in the selected body of literature during the data analysis were related to the need to better understand specific concepts that emerged from analyzing the participants' stories. For example, I consulted a couple of additional sources that were outside of the timeframe used for literature selection (2000 - 2017) on reflective practice (e.g., Schön,1983) and "good" university leadership (e.g., Ramsden, 1998), and additional sources on strategies to cope with the physical demands of formal leadership (e.g. Lambersky, 2016; Lovelace, Manz, & Alves, 2007) and emotional intelligence (Goleman, 2006). In the remainder of this section, I discuss the findings, focusing on identifying the aspects of established leadership theory encompassed in the conceptual framework that are found in analyzing the participants' stories.

5.2.1. Leadership is an Evolving Multifaceted Phenomenon

This subsection explores how the first key finding fits within the literature by looking at how the conceptualization of leadership evolved historically, shifting from authority to responsibility, from leadership contained within one individual's formal role to leadership implemented by many, both formally and informally, and the impact of context to leadership approaches.

To begin with, participants in this study perceived leadership as an evolving multifaceted phenomenon. They made direct references or shared examples from which I could infer how they perceived the shifts in leadership conceptualization. These instances suggested that historically, leadership changed from top-down to more participative approaches, from leadership exercised by one (I-centric) to leadership exercised by many (We-centric). Top-down leadership approaches, more consistent with managerial, instructional, or transactional leadership (Bush, 2011; Lynch, 2012) were perceived by participants as not always suitable to education. Experiences from participants' early careers showcased a more directive, authoritarian leadership approach. Some participants associated this approach with what leadership was not, an old leadership paradigm, management, or an approach more suitable to followers who needed extensive direction to complete specific tasks. These findings are in line with what the literature says about how leadership conceptualization and implementation shifted over time (Cardno, 2013; Fenwick, 2010; Harrison, 2011; Northouse, 2016; Ramsden, 1998; Simkins, 2005; Yielder & Codling, 2004). More specifically, Kezar et al. (2006) detailed concepts that older paradigms of leadership did not address what they called "revolutionary concepts" of higher education leadership. Temple and Ylitalo (2009) argued that inclusive leadership was a viable approach in reframing leadership and administrative processes in education. Finally, Simkins (2005) highlighted the importance of context in the leadership approach and development and Leithwood (2008) emphasized that educational leadership needed to consider both "best" and "next" practices. Thus, participants' conceptualizations of leadership were more consistent with how leadership was defined and described in more recent literature.

Additionally, participants conceptualized or described leadership by using everyday language and metaphors or established terminology in the field. The use of the former could demonstrate their ability or inclination to deconstruct a complex

phenomenon—such as leadership—and connect its aspects to ideas or metaphors that are familiar in order to facilitate a better understanding of the phenomenon. Perhaps this was an approach they used in their interactions with others to help them understand the different facets of leadership practice. On this note, Skorobohacz et al. (2016) sought to understand how metaphors used by followers illustrated leadership interactions in academia. Participants also used established terminology when referring to or describing leadership, such as charismatic, transformational, transactional, collaborative, or participative. Looking more closely at how this terminology was used in interviews, I noticed that it focused on aspects of leadership as they related to people. Hence, it can be inferred that participants conceptualized leadership as primarily concerning people (individuals or groups). As well, possibly related to the overall mission of education, participants emphasized numerous features of relational (Uhl-Bien, 2006), invitational (Lynch, 2012), authentic (Avolio et al., 2009), servant (Barbuto & Wheeler, 2006), caring (Uusiautti, 2013), and transformational (Stewart, 2006) leadership. In addition, aspects of more collaborative approaches to leadership such as participative (Bush, 2011), shared (Avolio et al., 2009), and distributed (Bolden et al., 2008) were present.

Aspects of some theories and models specific to education discussed by Bush (2011) and Lynch (2012) are present in this study, too: the focus on multiple perspectives is consistent with more recent conceptualizations of leadership; on individual motivation, feelings, and emotional intelligence with emotional leadership; on adaptability of style according to situations with contingent and situational leadership; on engagement of stakeholders with transformational and sustainable leadership; and on values, beliefs, and ethics with moral or ethical leadership. When considering how participants portrayed good leaders, these descriptions are very much in line with some of the established leadership theories, which focused on positive behaviours, skills, and influence, or found in people-centered leadership theories and models, such as the ones mentioned above. Bad leaders were generally described possessing characteristics or exhibiting behaviours on the negative spectrum of leadership such as preudotransformational, transactional, or laissez-faire leadership (Northouse, 2016). The experiences participants shared demonstrated their striving to develop and exercise good leadership for they perceived it as more effective in supporting their followers' development and attaining organizational goals.

Some of the newer concepts and approaches of leadership were present in participants' stories and were detailed in the previous chapter. In these newer approaches to leadership, leadership is about responsibility—in the sense of trustworthiness, dependability, and a sense of duty—rather than authority—in the sense of power and control (Bush, 2011; Dinh et al., 2014; Northouse, 2016). Perhaps authority remains an inherent part of formal or instructional leadership as perceived by teachers, or as expertise in a subject matter in collaborative or distributed settings (Bush, 2011; Lynch, 2012; Northouse, 2016). But participants considered that leaders were generally responsible for the people in their organizations and for reaching goals intended to move people and organizations forward. There was also a sense of shared responsibility and high moral and ethical standards. This shows not only the change in how leadership phenomenon has been reconceptualized over time, but how the functions of leadership and management have been increasingly considered as separated: leadership is perceived as producing change and movement while management as producing order and consistency (Northouse, 2016). Yet, both management and leadership were perceived as vital for organizational success. In North American education, the term administration is widely used to refer to senior leadership roles in educational organizations (Bush, 2011). Although participants acknowledged that management competencies were essential for a "good practice" of formal leadership, leaders who solely relied on these competencies were most likely deemed operational, or perhaps good managers or administrators. But if they lacked human skills (i.e., people skills), which were considered essential to leadership, they would most likely be perceived as bad leaders. Hence, formal leadership roles called for a combination of skills and competencies in all three areas: leadership (people), management (processes/tasks), and administration (resources).

Participants in this study worked in various roles in education (K-12 or PSE) or other sectors (private or public) throughout their careers. In conceptualizing the leadership phenomenon, they referred to or described it using a wide range of terminology, yet this conceptualization was within the same realm—as concerning people, relationships, influence, and change. Context played an important role in leadership, a finding that is also supported by Bryman (2004), Bryman & Lilley (2009), Bush (2011), Kezar et al. (2006), and Simkins (2005). To be successful, leaders are required to become familiar with the system they work in, as well as their organization,

its environment, and policies governing them. It seems that in some participants' perspectives, K-12 had a more hierarchical structure, similar to corporate settings, whereas in PSE, the hierarchy seemed flatter. This does not mean though that all organizations within a sector are structured or function the same. In fact, the leader or the leadership team largely influences the approach. From participants' stories, it can be inferred that there are leaders in K-12 who are more participative and strive to create opportunities for teacher leadership as well as leaders in PSE who are more authoritarian and transactional in their approaches. Although leadership was conceptualized by participants within the same people-oriented framework and the general principles of accomplishing core leadership tasks were similar, the actions taken to solve specific practical issues differed, often being modeled by the organization or the sector. These findings are supported by the literature focusing on the interdependencies between leadership and context (Bryman & Lilley, 2009; Lynch, 2012; Sathye, 2004; Vilkinas & Cartan, 2015). Also, when the focus shifts from a formal position of authority to behaviours and shared expertise, the hierarchy becomes flatter (Amey, 2005; Wang & Sedivy-Benton, 2016). In participants' interviews, the context was central to leadership, which made some transitions between sectors or the transferability of leadership styles from a context to another somewhat difficult. For this reason, these transitions called for flexibility and continuous learning on the leaders' part. In this sense, other characteristics that leaders needed to possess were awareness, adaptability, system thinking, and foresight (Barbuto & Wheeler, 2006; Kezar et al., 2006; Minarik, et al., 2003; Thornton et al., 2004).

Perhaps, leadership stories are not as different as one may think. This could be inferred from the little disagreement that I found in the dataset, which is different than my observations during the pilot testing phase. Participants often presented differing approaches to addressing specific leadership issues rather than philosophical or general practice. In fact, since leadership is highly contextual, the observed differences could be adaptations of the same general principles in different contexts. However, the fact that participants were exposed to leadership in the field of education—through school, work, or both—could have also contributed to their more uniform perspectives of leadership. As previously mentioned, generally, participants appreciated collaborative and consultative approaches of leadership and perceived more authoritarian approaches as being forms of bad leadership. But this could also show the tension between old and

new, between nostalgia of the past and the hope for tomorrow. Or, it may be a result of their exposure to similar theoretical concepts and research within their doctoral programs. What seemed to differ though, as it appeared from the experience shared by participants who worked across sectors, were the "accepted" approaches and practices within a sector. These are and may need to remain contextual because they are enacted in response to addressing unique issues within that sector. The greater need I see is for leaders to inquire about what "the other perspective of leadership" means before dismissing it entirely, and in the process, wherever appropriate, create meaningful alliances. Leaders could learn from approaches to leadership in different organizations and improve their practice by reflecting on their own leadership style and recognizing what is suitable to incorporate in their own contexts (Pennington, 2003; Sathye, 2004).

To summarize, the historic shift in leadership conceptualization, the complexity of the phenomenon, the variety in terminology used to define and describe it, and the impact that context has on leadership are in line with what is found in the literature used to create the conceptual framework for this study (e.g., Avolio et al., 2009; Dinh et al., 2014; Kezar et al., 2006; Northouse, 2016; Simkins, 2005). Specifically, Bryman and Lilley (2009) recognized that "higher education is itself a distinctive context and that therefore many of the leadership principles that are known to work in other spheres or sectors cannot be transplanted into universities" (p. 338). Educational leadership is about responsibility for teams and organizations, it emerges within the people-side of organizations, and some of its primary features and goals are specific to education—teaching, learning, scholarship, and research (Bolden et al., 2008; Cardno, 2013; Lynch, 2012; Yielder & Codling, 2004).

5.2.2. "Good Leader(ship)" is a Relentless and Selfless Endeavour

This subsection explores the second key finding, beginning with how people's perspective of leadership developed, followed by five core leadership facets that emerged from the dataset: social, mental, emotional, spiritual, and physical.

For participants in this study, leadership perspectives were shaped by a variety of sources over the course of their life, such as the environment they grew up in, mentors, role models, and educational and professional experiences. Although formal education consolidated participants' conceptualization of leadership, they drew

metaphors from many aspects of life to describe leadership. Sharing experiences from their formative years and the effect that personal role models had on their developing leadership showed that leadership development could not be restricted to a certain space and time. Participants also shared how their own leadership approach changed upon learning more about leadership or gaining more leadership experience. This evolvement of leadership may also be noticed when participants changed careers or organizations. Studies that discussed different stages of leadership and ways in which learning contributed to leadership development have been conducted by Allison and Ramirez (2016), Amey (2005), Jameson (2012), and Madsen (2007). Learning from others through forging mentoring relationships and engaging in dialogue was perceived as a major influence on participants' leadership development. These formal or informal interactions offered a critical eye, advice and feedback, or a non-judgemental "safe space" for profound conversations about difficult leadership issues. Studies that demonstrated the impact of such forms of learning include work of Bryman (2007), Catalfamo (2010), Lawler and Sillitoe (2013), and Sathye (2004).

In analyzing participants' stories to understand how leadership was conceptualized, developed, and implemented, there were five core leadership facets that could be perceived as contributing to the welfare of leaders, followers, and organizations: social, mental, emotional, spiritual, and physical. These facets of leadership are discussed in more detail next. To begin with, processes that take place in developing and implementing leadership and manifest in interactions between people constitute the social facet of leadership. These interactions can be unidirectional or multidirectional and are the basis of relationship or culture building. In developing these interactions, participants emphasized the importance of interpersonal skills such as open communication, authenticity, active listening, and empathy, which are some of the essential leadership skills found in literature (e.g., Avolio et al., 2009; Basham & Mathur, 2010; Cloud, 2010; Martin, 2011). Relationships were important in staff recruitment and retention and generally, the quality of relationships supported or hindered the exercise of leadership. Fairness, trust, motivation, and invitation of others in leadership processes were important to participants. This is consistent with the literature focusing on relationships in leadership (e.g., McKnight & Martin, 2013; Riley & Russell, 2013; Skorobohacz et al., 2016; Uhl-Bien, 2006; van Ameijde et al., 2009). Related to the collective domain of leadership, in cross-functional teams, committees, taskforces, or

project-oriented ventures across departments or organizations, the following strategies were considered helpful in achieving common goals: engaging stakeholders in dialogue by initiating discussions in a non-judgemental, participatory environment, and finding suitable approaches to overcome challenges. Similar ideas are found in literature, specifically in distributed, shared, team, participative approaches to leadership, or hybrid configurations, which incorporate individual and collective features of leadership (e.g., Bolden et al., 2008; Bryman & Lilley, 2009; Bush, 2011; Dinh et al., 2014; Gronn, 2009, 2016; Holt et al., 2014; Lynch, 2012; Middlehurst, 2008; Northouse, 2016).

In addition, processes that participants engaged in when learning about leadership represent the mental facet of leadership. This learning may take place in different settings—formal, non-formal, or informal. Engaging in continuous learning and reflection was considered by participants to be a vital part of leadership development. Learning and reflection allowed leaders and followers to strive to become a "better version" of themselves. In general, past learning may inform today's practices but may not meet tomorrow's needs. Hence, learning from and reflecting on past experiences, as well as remaining open to new learning opportunities would allow someone to reach their full potential, be prepared to deal with new challenges, and contribute more meaningfully to their organization. Participants in this study learned from their own positive and negative experiences, from interactions with others, or from observing other's leadership. They also learned to move beyond a rigid leadership approach and adapt to new situations by familiarizing with and incorporating different perspectives and approaches to leadership. Some studies discussing the centrality of learning and reflection, as well as the need to adapt constantly to leadership contexts and situations were conducted by Avolio et al. (2009), Amey (2005, 2006), Kezar et al. (2006), Lynch (2012), and Lawler and Sillitoe (2013). When discussing reflective practice, Finlay (2008) contrasted effective reflective practice, which would "embody professional artistry, encourage critical self-aware evaluation, and embrace transformation and change" (p. 20) with the rather "bland and mechanical" (p. 20) process that takes place when people are "disinclined to ask the awkward questions" (p. 20). The former would be preferred in leadership.

Moreover, leaders' responses to what occurs in their learning or exercise of leadership in terms of emotional responses to or feelings associated with events represent the emotional leadership component. Understanding people by weaving both

cognitive and emotional aspects would potentially create stronger and more meaningful relationships, which were essential in leadership. For participants in this study, sharing struggles and negative leadership experiences in interviews brought some sadness whereas successes and positive experiences came with laughter. I also related to the stories they shared and recalled that similar events from my own experiences produced similar emotional reactions. The strong emotional response that participants expressed in experiencing or recalling positive or negative events during their interview shows leadership as an emotional journey. Although emotions form only a facet of leadership, it is a critical one in ensuring people's workplace well-being and leaders need to understand how their behaviours and actions impact the emotional state of followers. Leaders' behaviours and actions influence people's emotions and performance (Lambersky, 2016; Lamm et al., 2016; Goleman, 2006). In this study, consistent with what the literature related to the role of emotions in leadership says, a thoughtful approach to leadership seemed to have more positive outcomes for both leaders and followers. In participants' interviews, when followers experienced "good leader(ship)", the emotional response was often excitement, gratitude, or inspiration. People's morale was high, and they performed better. But when followers experienced "bad leader(ship)", emotions such as frustration, anger, or fear emerged. People's morale was low, and their performance suffered. Emotional intelligence promotes leaders' self-awareness and is helpful in relationship and culture building. There is an increasing body of literature on emotions in leadership and the importance of emotional intelligence and emotional competence for both leaders and followers (Allison & Ramirez, 2016; Avolio et al., 2009; Beatty, 2000; Cabrera, 2010; Coco, 2011; Goleman, 2006; Heifetz & Laurie, 2001; Kezar et al., 2006; Lambersky, 2016; Leithwood et al., 2006; Lynch, 2012; Martin, 2011; Northouse, 2016; Uusiautti, 2013). This body of literature shows that developing capacities to provide emotional understanding, empathy, trust, and support and to express feelings (positive or negative) appropriately in interpersonal relationships are key in dealing with complex or sensitive issues—which inherently accompany leadership, ensuring the well-being of leaders and followers, and developing an environment conducive to personal and professional growth.

Next, the inner experiences that participants shared as they related to awareness, sense-making, values and beliefs, internalized learning, or sense of belonging indicate the spiritual leadership piece. Engaging in reflection conferred

participants opportunities to deeply analyze their experiences, draw lessons, and strengthen their perspectives of leadership. The more recent research on leadership shows a focus on various aspects of spirituality, as well. Avolio et al. (2009) argued that even though there was no agreement on what spirituality meant, this facet added to the overall understanding of leadership. Kezar et al. (2006) recommended more empirical research to better understand spirituality. Dinh et al. (2014) and Northouse (2016) also noted the emergence of spiritual leadership, and Catalfamo (2010) highlighted the importance of self-awareness in the processes of influence of others. Leaders who possess characteristics or develop human (or people) skills in line with caring, servant, or invitational leadership approaches, along with technical skills and competencies required to fulfill their roles are often better leaders, and are more likely to initiate and develop an ethical environment conducive to others' learning and meaningful contributions (Avolio et al., 2009; Barbuto & Wheeler, 2006; Cloud, 2010; Lynch, 2012; Uhl-Bien, 2006; Northouse, 2016; Uusiautti, 2013).

Finally, some participants mentioned long hours, tiredness, a lack of balance in their lives, and burnout as likely to accompany senior leadership roles. Such stresses suggest that leadership has a physical component, as well. Considering the increasing demands and complexity of educational leadership, it is thus vital for leaders to re-evaluate priorities, access support networks, and find ways to cope with stress in order to ensure their own and their teams' well-being and avoid long term negative consequences. As it emerged from participants' stories, inappropriate resourcing, increasing workloads, and unrealistic expectations are some sources of physical or mental stress that need to be addressed. Inadequate intrapersonal skills and ineffective interpersonal relationships are also strenuous. But looking more closely at these stresses and considering how leadership is defined, it looks like what causes more stress is related to management or administrative aspects of work rather than leadership *per se.* This assertion may also imply that the three concepts (leadership, management, and administration) are closely connected, and it is difficult to fully understand them separately, especially as they appear in formal leadership. Some studies that show the physical demands of leadership and offer some strategies to address them are Allison and Ramirez (2016), Catalfamo (2010), Lambersky (2016), and Lovelace et al. (2007).

To summarize, leadership is not a straightforward endeavour but a complex lifelong journey. The five core leadership facets discussed in this section overlap in

many aspects yet taken together rather than separately may present a better picture of leadership. Leaders need to ensure their well-being in all five facets of leadership before being able to engage fully in helping and supporting others. This endeavour is not easy, nor instant, but requires persistence, resilience, and commitment. Also, it is worth noting that leadership approaches such as those conceptualized by participants as "bad" did exist in education, yet in their perspective, these approaches were not constructive. Participants also recognized the need to avoid them or address them whenever encountered. Leadership is about influence and by looking at how participants perceived or experienced "bad leader(ship)", it may be concluded that these approaches most likely would not support the achievement of positive personal or organizational goals whereas "good leader(ship)" would.

5.2.3. Learning, Experience, and Reflection are Fundamental to Leadership

In this study, learning about leadership, gaining experience, and reflecting on both learning and experience were fundamental to leadership development and practice. These aspects of leadership are the focus of this subsection, which discusses the third key finding of this study.

Learning as it related to leadership was also discussed briefly in the previous subsections. Here, I am focusing more on how what is learned may be further applied to practice. Looking at the findings of this study, leadership practice seemed to take shape in constant "refining by doing" processes and participants' engagement in trial and error approaches when dealing with unfamiliar issues. These endeavours turned to be struggles or successes, the former having more impact on participants' leadership development. What seemed of importance to participants was the freedom to experiment and take risks in attempting to find creative solutions to issues encountered. Reflection on learning and experience provided ways to examine issues broadly and dive deeper into the specifics of the situations encountered. This reflective approach contributed to understanding issues and anticipating short-term or long-term outcomes. Improvement of practice was often the result of engaging in continuous learning and reflection. Becoming reflective practitioner improves practice (Allison & Ramirez, 2016; Bush, 2011; Kezar et al., 2006; Lawler & Sillitoe, 2013; Schnelker, 2006; Schön,1983). But Bryman and Lilley (2009) claimed that theory and research did not always influence

leadership practice of higher education leaders who also engaged in leadership research; however, it is acknowledged that the methodological approach, particularly sampling, could have impacted the results of their study. What my study showed was that participants recognized the positive impact that their studying leadership, their own research, and becoming familiar with theory had on their practice. Perhaps this is because one of their primary motivations to pursue formal studies of leadership was to find ways to improve practice.

Feedback plays a major part in one's leadership development. Hence, fostering a positive environment where feedback is encouraged and perceived as an opportunity for learning is conducive to growth. This approach helps build people up, inspire confidence, and motivate change. Participants often referred to the need for leaders' accountability, as well as the value of instances when they received constructive feedback. The value was given by identifying mistakes before becoming habits, patterns, or behaviours. Providing feedback is present not only in the work of leaders. Participants perceived teaching and parenting as having similar goals as leadership. Ramsden (1998) claimed that in fact, good higher education leadership resembled good teaching or good research in higher education. Some studies that referred to learning, feedback, and creating an environment that encouraged growth as foundational to leadership are Bedard and Mombouquette (2015), Bryman, (2007), Car, Holmes, and Flynn (2017), Heifetz and Laurie (2001), Sathye (2004), and Uusiautti (2013).

Although leadership was still primarily associated with assigned (or formal) roles, participants recognized that it emerged informally, as well, in everyday practice, grassroots initiatives, project or committee work, and mentorship. This is in line with themes found in the literature about the emergence of leadership (Amey, 2006; Bolden & Petrov, 2014; Bryman, 2004; Middlehurst, 2008). The elements of leadership (formal or informal) that participants appreciated and strived to develop in their practices were positive personal characteristics, appropriate competencies relevant to a situation encountered, and a leadership style that met followers' needs and supported collaboration in achieving common goals within their context (see Northouse, 2016). These characteristics, competencies, and styles were developed by engaging in different forms of learning, experience, and thoughtful observations. In general, opportunities for learning are designed with a specific purpose; hence, organizations need to expand their support and remove barriers for leaders to take part in various types of learning, so that

they develop capabilities in line with individual and organizational needs (Bedard & Mombourquette, 2015; Catalfamo, 2010; Stanley & Algert, 2007).

To summarize, leadership is a journey of continuous learning for leaders, followers, and organizations. Learning from theory, research, and experience helped participants develop their leadership and identify ways to motivate and support followers to engage in meaningful work. Usually, a collaborative approach was conducive to learning and growth because this approach exposed people to new knowledge and perspectives. The learning process also involved continuous assessment and improvement of practices as the context or the situation required (Bolden et al., 2008; Bolden & Petrov, 2014; Bryman, 2004; Dinh et al., 2014). With leadership and learning closely connected, it would be valuable to explore further how learning theories may impact one's leadership development.

5.2.4. Leadership Is the Subtle Force Behind the Growth of Individuals, Organizations, and Communities

This subsection discusses how leadership affects individuals, organizations, and communities, and how goals are accomplished by engaging stakeholders in dialogue. For participants in this study, leadership was mainly concerned with processes that effected people's personal and professional growth. Leadership was not about authority and power. Considering Northouse's (2016) concept of influence within a context, leadership seems to be the reason behind the development of individuals, organizations, and communities. Participants highlighted their own development as leaders and how leadership emerged in relationships with others or in groups. This idea was not unexpected since most participants worked and developed their leadership in the education sector, which focuses on people learning and development. Participants did talk about specific tasks or processes, organizational development, and the overlap between leadership, management, and administration, but the focus of the discussions was the people, the roles they took in various situations, the mutual influence emerging in these situations, and the contributions they made to achieving set goals.

Relationship building was one of the primary leadership tasks that emerged from the data collected for this study. These relationships, either formal or informal, were based on motivation, support, empathy, trust, and encouragement of others to achieve

personal or professional goals. Lamm et al.'s (2016) model of interpersonal leadership also identified support, motivation, and development of others as main functions of leadership. Based on participants' stories, the process of influencing one another needed to be approached with care, trust, respect, humility, and authenticity. Developing meaningful and supportive relationships is the basis for achieving goals (Badaracco, 2003; Barbuto & Wheeler, 2006; Cabrera, 2010; Kezar et al., 2006; Lambersky, 2016; Ramsden, 1998; Sathye, 2004; Simkins, 2005; Temple & Ylitalo, 2009).

One other role of leadership was to foster change, which could be individual or organizational (Hiatt & Creasey, 2003). Leaders "lead his or her people through change" (Ramsden, 1998, p. 348) and they can help their people "embrace change enthusiastically" (Ramsden, 1998, p. 368). Change is a lengthy process and is often met with resistance unless the reasons behind the change and the outcomes are made clear (Hiatt & Creasey, 2003). Leaders often become agents of change in their context. But in participants' stories, deep-seated beliefs and practices, lack of contextual knowledge, and a culture of fear or complacency were shown to hinder change. Leaders need to implement suitable change mechanisms, as well as encourage followers to deal with situations that arise and adapt to change. Engaging stakeholders in change processes, leveraging opportunities together, and recognizing different perspectives and expertise in decision making processes were perceived by participants as conducive to achieving results. When making decisions, leaders often faced dilemmas such as remaining transparent without breaching confidentiality or including all voices in the process of making decisions that affected multiple stakeholders. The former often generated tensions between leaders and followers, which needed to be addressed with tact. Accomplishing inclusion did not seem always easy, either. Listening to participants stories about "all voices to be heard" in decision-making, I wondered about times when voices—be they individual or collective—would become dominant. Ultimately, any voice has the potential to become dominant or be silenced. But can *all* voices be included in *all* decisions, *all* the time, or is this unrealistic? Perhaps, as a couple of the participants mentioned, building consensus is a solution, yet it may produce a false sense of inclusion if not handled appropriately. Both leaders and followers need to be prepared and willing to enter the space of respectful disagreement and address difficult issues such as inappropriate use of power, destructive conflict, and overt or covert discrimination. There were many examples in the literature of change processes that

were explored at individual and organizational levels (e.g., Basham & Mathur, 2010; Bryman, 2004; Cloud, 2010; Fullan 2005; Hiatt & Creasey, 2003; Northouse, 2016; Ramsden, 1998; Temple & Ylitalo, 2009). These changes included building community (Sathye, 2004; Temple & Ylitalo, 2009), collegiality, collaborative processes, and decisions (Humphreys, 2013; Jones et al., 2012; Kezar et al., 2006; McClellan, 2010; Stanley & Algert, 2007), risks and problem solving approaches (Cloud, 2010; Lawler & Sillitoe, 2013), paradigm shifts and the role of culture in change (Bush, 2011; Gentle & Clifton, 2017; Kleemann, 2005).

In addition, for participants, leadership seemed to also be about foresight. This meant that leaders needed to try to anticipate consequences of decisions or practices. Focusing on the present and future in making decisions, as well as carefully analyzing all the information available on an issue seemed to emerge from the interviews as being good leadership strategies. This finding is consistent with themes found in the literature (Barbuto & Wheeler, 2006; Northouse, 2016; Woodard et al., 2000). If I were to look at this strategy and attempt to apply it with a wider purpose, then, remaining hopeful about the change each leader can make for others is key. This approach may help a prepared leader initiate the needed change in their organizations, starting with each individual or team they are responsible for.

However, systemic and organizational barriers do exist and one of the leaders' responsibilities is to find ways to address these barriers, so that they cease to hinder the growth of people and organizations. In general, systems are created by people. Hiatt and Creasey (2003) highlighted that managing both organizational and individual change were needed to achieve desired outcomes. Perhaps the first step to change systems is to attend to people's attitudes, behaviours, and knowledge. Change is a long journey, yet an essential one for leaders, who have the responsibility to understand what needs to change, assess what they can do, and take action. Some systemic and organizational barriers found in the literature were related to biases and stereotypes, structural issues, inappropriate resourcing, organizational bureaucracy or politics, and issues related to technology or policy implementation (Catalfamo, 2010; Gudz, 2004; Northouse, 2016). Some of the organizational factors that influenced leadership implementation were size, structure, resources, time, and external environment (Bush, 2011). System thinking and a holistic or integrated approach to leadership were considered helpful in carrying out leadership processes and change in organizations (Bolden et al. 2008; Fullan 2005;

Northouse, 2016; Senge et al., 2012). Leaders are required to systematically draw from theory, research, and practice in what they do. They are responsible and held accountable for completing tasks and achieving goals, as well as for engaging their people in these processes.

To summarize, leadership is key in the development of people and organizations. For participants in this study, leadership focused on individuals, relationships, influence, and change, components that were consistent with themes found in the literature on educational leadership. Engaging stakeholders in dialogue contributed to collaborative decisions that fostered meaningful change. It was also important that leaders developed capacity of foresight to minimize detrimental consequences of decisions rushed by external or internal pressures or expectations. But discussing the role of leadership as influence and change in organizations only through the leadership lens might not be sufficient and organizational theory could provide additional facets that leadership theory alone would not.

5.2.5. Section Summary: The Four Key Findings in Light of the Literature

Considering the four key findings in light of the literature demonstrates that leadership is indeed a complex and multifaceted phenomenon. Also, a leader cannot work in isolation. In fact, the concept of leadership implies the existence of an "other"— either an individual, a team, or an organization. Hence, leadership is relational, and it involves supporting, empowering, and resourcing others to engage in personal or organizational development and change. "Good leader(ship)" is a selfless journey since even when leaders engage in their own leadership development, they do so mostly with others in mind. They want to be better equipped to support and encourage transformation in those whom they lead or encounter on their leadership journeys. Leaders commit to be of service to others, to understand them better, help them identify their potential, and create opportunities for growth. Depending on their spheres of influence, leaders initiate change that can impact few or many and contribute to the development of individuals, organizations, or larger communities.

Furthermore, since leadership is contextual, it often requires that leaders be flexible in their approaches and reflect on and refine their practices based on the

situations they need to address in their context. But flexibility entails preparedness and resourcefulness. Therefore, building the practice of leadership takes time and commitment to continuous learning. It is recognized that, when theory, research, and practice inform one another, the "good practice" of leadership (Bush, 2011) emerges, an endeavour that participants in this study strived to constantly engage in. Overall, participants perceived leadership within the people-centered group of newer leadership theories or models, and as focusing on positive aspects of influence, relationship development, and change (Avolio et al., 2009; Bush, 2011; Lynch, 2012; Northouse, 2016). Although participants' experiences revealed aspects related to more managerial or administrative facets of formal leadership, aspects of leadership theories emphasizing a leader's influence on individuals, groups, or entire organizations and the processes used to achieve results were more prevalent in their experiences. Grasping the leadership theory and research was considered fundamental to "good practice". The next section explores some of the implications that participant experiences with leadership have on programs that aim to prepare leaders (or leadership education).

5.3. Implications for Leadership Education

This study showed that learning was central to leadership. Participants in this study developed their leadership by engaging in various forms of learning and experience. Leaders described by participants engaged in leadership development opportunities that were in line with personal and organizational needs and values. Catalfamo (2010) identified three forms of education in leadership development: formal, non-formal, and informal. Participants in this study pursued a doctoral program in leadership (formal), as well as engaged in continuous professional development (non-formal) and cultivated mentoring relationships and learned from observing and emulating other leaders or role models (informal). Hence, they engaged in all three forms of learning. Considering the findings of this study and how they relate to the literature, this section presents some of the implications for the design and development of formal (i.e., academic), non-formal (i.e., professional development), and informal (i.e., mentoring and role modeling) education.

5.3.1. Formal Education

As seen in the previous section, leadership is a complex and multifaceted phenomenon. Developing leadership may be a lifelong journey. Long-term engagement in leadership studying and exercise helped participants develop a deep understanding of the phenomenon and a toolkit of leadership concepts and strategies. Catalfamo (2010) argued that formal education has the largest impact on one's leadership development. This subsection explores the implications for formal (academic) leadership education as they emerged from the participants' experiences in the Educational Doctorate in Leadership (EdDL) program. The subsection focuses on implications related to program structure and support network, creating space for learning and reflection, encouraging dialogue and self-directed learning, offering exposure to theory and research, and developing relevant engagement opportunities. Although participants' experiences are situated within the same academic program, these experiences provide insights that would be useful in designing and developing other types of academic leadership studies programs.

Structure and Support Network

Engaging in formal education is not the same as working. Formal education is primarily developmental. Sometimes, it may be difficult for students, particularity students coming from non-traditional forms of education, to adjust to new learning approaches. The cohort model of the doctoral program allowed for building a sense of community and creating an environment conducive to dialogue, which mirrored what practice would be. These features were considered by participants valuable in their preparation for their leadership roles. But since most undergraduate education is not cohort-based, some students may need time and support to adjust to this style. To someone pursuing a graduate program mid-career, which was the case of many participants in this study, this adjustment may not be easy. It could involve a mindset shift. Perhaps this is a learning process in itself and valuable to experience as it could be directly applicable to leadership. When these conditions are not made explicit, internal or external tensions may arise. Students' capacities to cope with such tensions and monitor changes or transitions become essential in completing the program and further engaging in leadership. Hence, mechanisms need to be put in place to support students in navigating the challenges they encounter during the programs they pursue. Support that

may be provided to students in these transitions are easy and timely access to information and an appropriate level and type of resources. As well, initiatives such as inviting guest speakers with experiences in diverse roles or organizations, alumni, or students from other cohorts could strengthen the connections within the community of leaders and provide a channel for sharing experiences with others. While students may access non-formal opportunities for learning outside the program, integrating some opportunities for engagement, networking, and knowledge dissemination within the structure of the program would offer peer support, encouragement, and motivation to students.

Furthermore, participants in this study perceived leadership as a collaborative and participative process, which is in line with newer approaches to leadership (e.g., shared, distributive, or inclusive). There was a general sense of the positive effect of bringing various perspectives together in making decisions about complex issues that concerned multiple stakeholders. This perception may be because in the doctoral program, participants were exposed to leadership theory and research in this area. Or, the approach to teaching and learning in the program may have contributed to developing this perspective. But participants could have been exposed to this type of leadership approach in practice, as well. I assume that this might be one of the reasons for the lack of major disagreements found in this study. By looking more closely at the cohort participants were part of, it can also be inferred that they have constructed or consolidated their view of leadership as an infusion of perspectives through their interactions with others in the learning space provided by the program. If that is the case, then careful consideration is needed in forming the cohorts to allow for a range of experiences and viewpoints.

Space for Learning and Reflection

Having a clear understanding of personal and professional values would ground leaders' actions and help them engage in meaningful change (Bush, 2011). Becoming a reflective leader was essential to participants. It seemed that participants' overall perspectives of leadership guided their development and implementation of leadership, as well as how they perceived others' leadership. They acknowledged that their own approaches to leadership changed because of their exposure to theory and research, as well as their gaining relevant experience. Therefore, since the program impacted

participants' leadership greatly, in designing formal programs, it would be beneficial to incorporate readings on a wide variety of leadership topics and create opportunities for taking part in different role plays and discussing various case studies that are based on situations arising in their practice. Posing the challenging questions, reflecting on difficult issues, and attempting to find solutions to practical problems would elicit thorough examination of beliefs and attitudes, consolidation of views, and identification of gaps or areas for change.

Dialogue and Self-directed Learning

Participants shared that during the coursework, they explored difficult topics related to education and educational leadership, which helped them broaden their knowledge of theory and research in the field. In the EdDL learning space, participants connected with others in meaningful discussions and tapped into one another's expertise and experience, which allowed them to learn about different ways to approach issues that arose in practice. Participants referred to learning from resources explored as part of the curriculum and described how these impacted their leadership practice. In analyzing the dataset, I noticed that some participants who were part of the same cohort or worked together at some point in their career, to some extent, exhibited similar understandings or approaches to practice or emulated the same role models. These findings show that some knowledge and understanding of leadership are socially constructed within cohorts of students. Hence, both the structure of a cohort and the curriculum taught are key in providing students with diverse opportunities for learning and exploration of a wide variety of leadership perspectives and topics that would prepare them for their leadership roles.

It may be unrealistic to expect that the coursework would cover all topics related to leadership. Leaders need to continuously develop critical thinking skills and engage in learning as needs arise in practice. Hence, academic programs would need to help students develop a general framework for practice and facilitate engagement in self-directed learning, building self-efficacy, and development of capacity to reflect and integrate learning into practice. A "reflective practitioner" is one who strives for an "eclectic approach" to leadership and "conceptual pluralism" since it is argued that no single leadership model can address all practical aspects in educational organizations (Bush, 2011; Schnelker, 2006; Schön, 1983). This would provide leaders with a

comprehensive understanding of the leadership phenomenon and an appreciation of how theory could guide their actions in practice. One other important aspect to consider here was that the timing of such a program in participants' careers directly affected the extent to which they could use their learning in practice. For instance, participants who pursued their doctorate mid to late career felt that career-wise, they would have benefited more from taking the program earlier. Participants who pursued the program to benefit the role or organization they were in, or those who intended to change their career paths or start a new career upon retirement felt that they attained their purpose. Hence, people who want to pursue a lengthy program such as a doctorate need to be cognizant of the different applicability of their learning.

Exposure to Theory and Research

As previously mentioned, Bush (2011) highlighted that "good practice" of leadership was informed by a combination of good experience, exposure to a broad range of theory and research, one's capacity to distil theory, and meaningful dialogue. He argued that relying solely on experience limited one's capacity of understanding and that theory often explained or guided practice by offering a basis for making informed decisions and solving practical problems. Leadership literature encompasses a wide range of leadership models that could guide one's practice (e.g., Avolio et al., 2009; Bush, 2011; Fullan, 2001; Kezar et al., 2006; Lynch, 2012; Northouse, 2016). In academic programs focusing on leadership development, careful consideration needs to be given to continuous reflection with a dual purpose: understanding procedural aspects of graduate studies (e.g., writing, research, literature, etc.), and better understanding of one's worldview, what informs it, and how it may affect their graduate work and leadership practice (e.g., Schnelker, 2006).

In addition, formal leadership programs need to be designed considering that leadership is a multi-layered phenomenon. Their goal would be to prepare leaders for a complex practice, which often entails handling difficult tasks. These programs need to address not only the complexities of phenomena as known at the time but prepare leaders to deal with unfamiliar situations that may occur in the future. This involves dealing with uncertainty, constructing solutions to unfamiliar problems in creative ways, making difficult decisions that involve multiple stakeholders, and foreseeing the risks and prospects of such decisions. Leaders are required to build trust, a good track record and

quality interpersonal relationships, as well as system thinking and an overall leadership style that is conducive to helping others navigate change processes and contribute their best (Fullan, 2005; Heifetz & Laurie, 2001; Lamm et al., 2016; Middlehurst, 2008; Minarik et al., 2003; Ramsden, 1998).

Relevant Engagement Opportunities

It may be useful to assess the needs and expectations of each cohort and incorporate or provide support to students to organize suitable events based on this needs assessment. Career pathways of people pursuing academic leadership studies may differ; hence, it is important that academic programs offer flexibility for engagement not only in activities in line with students' interests or as determined by institutional policies. For example, participants mentioned challenges encountered in senior leadership roles, such as hiring practices, managing budgets, and leading large teams or projects. Exploring such topics in a more explicit manner could help students be better prepared for taking on such roles. On this note, Riley and Russell (2013) argued that tailored professional development opportunities to meet the complexities of leadership roles in academia was important and that leaders were required to have a combination of skills in the areas of both "supervision of tasks" and "leading of people". Thus, separating of concepts associated with formal leadership—management, administration, and leadership—proves difficult.

From participants' stories, it can be observed that student engagement with their peers and the research community decreased after the coursework was completed. Students who enroll in professional programs usually have complex lives and careers and a schedule that allowed students to engage in studies without affecting their work schedule was useful. But after the coursework was completed, engagement decreased and some mentioned being "happy to get my weekends back". This change in pace and structure may have affected some students' academic progress. Independent work is helpful in providing the space for thinking through one's research topic and processes and it is required in developing one's capacities to conduct research. But creating some opportunities for involvement beyond the coursework could alleviate the feelings of disconnect that some participants referred to. These engagement opportunities might be perceived as counter to development of independent researchers, but in fact, they could provide avenues for continuous dialogue about research processes or topics of interest

and aid building a strong local community of researchers. Creating relevant engagement opportunities may also help students who come from non-traditional pathways, take longer to complete their program for various reasons, or disengage and eventually, do not complete.

5.3.2. Non-Formal Education

Although not all leaders engage in formal leadership studies, many seek to participate in other forms of learning. Participants in this study pursued non-formal education and strived to share their knowledge and expertise. They valued having access to others' perspectives on specific issues, which made these opportunities useful to continue to be involved in. However, it was acknowledged that due to their short duration and lesser rigor compared to formal programs, these opportunities would not have the same impact on leadership development.

Although this study shows that leaders who engage in long term formalized learning about leadership become better leaders, it may be unrealistic to require that all formal leaders take part in academic programs for leadership development. Thus, designing relevant non-formal leadership development opportunities is vital in preparing educational leaders for their roles. Leadership is not limited to completing tasks and solving practical problems. It is most likely that unprepared leaders lack awareness of challenges they would encounter in practice and/or exhibit bad leadership in the form of abuse of power or other harmful effects of their leadership approaches. As such, organizations and professional associations are responsible not only for recruiting people in formal leadership roles but preparing them for the complexities of these roles. Equipping leaders through professional development activities that target useful leadership topics and help people become familiar with theory and research could improve retention of both leaders and employees, as well as contribute to the development of individuals and organizations.

Although the short duration of non-formal opportunities does not allow for deep exploration of theory and research, they often offer exposure to other views and new ideas, as well as help clarify personal perspectives or find solutions to practical problems (Catalfamo, 2010; Sathye, 2004; Simkins, 2005). Perhaps a compromise can be reached. Leadership is closely connected with lifelong learning. Hence, what may be

useful is providing people who pursue non-formal opportunities with access to resources that they can consult in their practice, as needed. Nevertheless, non-formal leadership education needs to be assessed and adapted regularly in terms of the value it adds to the development of intrapersonal, interpersonal, and organizational leadership capacities.

5.3.3. Informal Education

Mentorship and role modeling were the primary informal opportunities aiming to prepare leaders for their roles. In literature, mentorship is shown as an important component of leadership development (e.g., Allison & Ramirez, 2016; Carr, Holmes, & Flynn, 2017; Lamm et al., 2016). Participants valued mentoring relationships and sought to learn from their mentors. These interactions provided participants with opportunities to receive feedback and advice, consultation, and investigation of difficult issues in a safe, non-judgemental space. Mentoring received from the supervisory committee and collaborators during their doctoral program was considered the main contributor to developing specific research and leadership skills. Observing their mentors' or roles models' leadership helped participants to develop their own leadership because these observations provided them with new leadership models and "promising practices" to emulate. But participants also engaged in mentoring relationships that helped others grow. They also strived to lead by example and valued the long-term relationships they developed with students, colleagues, and other leaders.

Participants in this study acknowledged that people who held or aspired to leadership roles were more likely to develop a "good practice" when engaging in long term leadership development processes. Considering the impact that informal opportunities for leadership development had on participants' leadership, it is important that leaders identify people (mentors or mentees) who may support them on their leadership journeys. Learning from mentors and supporting mentee's development, as well as learning from observing leadership and emulating role models were valuable to participants. A suitable mentoring approach included engaging in learning through dialogue, giving and receiving feedback and advice, helping the other person develop awareness of their potential, and finding ways to use their capabilities. When approached with tact and mutual respect, mentoring relationships were perceived as beneficial to the leadership development of both the mentee and the mentor.

5.3.4. Summary: Implications for Leadership Education

The diversity of experiences that informed participants' leadership showed that there was no one encompassing way to adequately prepare someone to engage in leadership. The journey of learning "about leadership" and "how to be a leader" may take a lifetime. For some participants, it began in the midst of tough issues encountered in practice, which required quick thinking and acting, whereas for others, it began in the rigour of academic conversations, which called for deep understanding. To prepare for leadership, participants engaged in continuous learning and application of what they learned. They developed their understanding of leadership from both accomplishments and struggles, the latter often providing valuable lessons. In all these processes, they demonstrated their own commitment to becoming skilled leaders and helping others develop their leadership, as well.

Designing leadership development programs to fully address all the areas described in this section may not always be possible due to time or resource constraints. But there are two important aspects to consider in designing any forms of leadership education. These learning opportunities need to help people develop awareness of what leadership entails in practice and they need to offer opportunities for growth beyond accumulation of knowledge. Accessing theory and research was perceived as useful to broadening one's leadership understanding, which, in turn, would impact practice. The long-term engagement in leadership development either through formal programs or informal opportunities (e.g., mentoring relationships) were shown to have more meaningful impact on participants' leadership. Although non-formal activities were useful, by themselves, they did not seem to suffice in preparing leaders to address the tough challenges of leadership. Therefore, people who aspire to leadership need to be willing to embark on a long process of learning by continuously engaging in relevant leadership development opportunities.

5.4. Chapter Summary

This chapter's purpose was to answer the two research questions posed for this study. It first presented the four key findings in relation to the literature, aiming to identify where practice met theory by finding aspects of theory that surfaced in the practice of educational leaders (RQ1). To answer the second research question (RQ2), in the

process of understanding leadership through participants' lens and my own perception of the phenomenon, I reflected on the role that leadership education played in participants' leadership development and how leadership education (formal, non-formal, and informal) may be enhanced to better meet the needs and expectations of current and future leaders. This study was not an evaluation of one or more forms of leadership education. The study was meant to draw from people's experiences about what worked and what did not work in their leadership development and implementation to inform other leadership development opportunities.

Leadership is a complex phenomenon and this study shows it, too. When leadership is perceived as separate from a function (formal), then it can be argued that leadership emerges in any role (informal) within an organization. Those pursuing the leadership endeavour need to be prepared for an altruistic and purposeful journey of learning and change. But this is not a journey of instant gratification. The fulfilment is often found in seeing people and organizations grow, which takes time. Leadership evolves within a context and it is geared toward meeting the needs of people involved and organizations. In a way, this suggests the joint responsibility of leaders to engage in the process of leadership development and of organizations to support the recruitment, growth, and retention of leaders. Considering the findings of this study and how they fit within the reviewed literature, some implications for theory and practice, as well as contributions to the field and recommendations for future research and practice are presented in the next chapter.

Chapter 6.   Conclusions and Recommendations

6.1. Introduction

This study investigated how a group of people who at some point in their careers pursued an Educational Doctorate in Leadership at one major Canadian university, Simon Fraser University, experienced leadership. In the study, I explored, analyzed, and interpreted participants' stories of leadership with a dual purpose. Firstly, I aimed to identify what aspects of leadership theory, as encompassed in the conceptual framework constructed for the study, were found in the practice of leaders. Secondly, I aimed to gain key insights in the design and development of leadership education. Building on the previous chapter, which discussed the key findings of the study in light of literature and the implications for leadership education, this chapter focuses on implications to theory and practice, as well as study's contributions to the field, recommendations, and limitations. The chapter concludes with presenting several meaningful lessons that I learned by engaging in this research study.

6.2. What It Means for Theory and Practice

There is a wide range of leadership theories, which address various facets of leadership, from general to more specific. But leadership is still not understood in all its aspects. Although attempts to construct a more encompassing leadership theory have been made, to date, no one single theory addresses all complexities of leadership. The centrality of context in studying leadership may make this task unattainable. Hence, instead of endeavouring to create a "universal theory of educational leadership", efforts need to be made to understand existing theories and what leadership facets they bring to light. Also, efforts need to be made to provide tools to help create meaningful links between diverse theoretical aspects, as the context require. Engaging in such systematic analyses of leadership theory could provide insights in at least three areas: breadth of knowledge of leadership theory, ways to classify theories based on focus or features, and a deeper understanding of specific theories.

This study demonstrated that leadership was indeed complex and evolving. When looking closely at leadership theories and models and the findings of this study, it

might be inferred that leadership is mostly concerned with the people-side of organizations. This study showed that continuous learning and reflection contributed to people's leadership development. Perhaps, integrating leadership theory with organization theory and/or learning and teaching theories adds more perspectives to the understanding of how leadership is developed and implemented in organizations. As leadership is context-bound, although the philosophy of leadership and general approaches are transferable between contexts, leaders need to continuously learn and adapt their styles to the specific needs of their organizations and those whom they lead.

A purposeful engagement in a process of discovery and making meaningful connections between theory and practice is helpful in widening one's understanding of leadership. As an example, the conceptual framework constructed for this study in the process of literature review provided me with a mechanism to help me make sense of previous leadership theory and research. But it also became a guidebook for data collection and analysis, and it helped me better understand the practice of leaders in participants' interviews. The study explored how participants perceived, developed, and exercised leadership in order to make connections between theory, research, and practice. Every phase of this study shows, in a sense, the interplay between theory, research, and practice of leadership.

As emerged from participants' experiences, there are no easy solutions to overcoming challenges that educational leaders encounter. Some of the challenges may not be fully or at all addressed by outdated organizational structures and policies, which may still govern organizations. Thus, leaders need to be equipped to undertake these challenges, identify where change is needed in structures and policies, and take actions that would move people and organizations forward. They would also need to continuously assess their leadership styles and the impact they may have in their organization. But leaders' willingness to participate in leadership education is not enough. Organizations are responsible for facilitating this participation and providing on-going opportunities to engage in learning and development. These opportunities would help leaders build appropriate levels of skill and competencies that would help them improve their practices. It is important to identify gaps and ways to develop competencies that would support organizational and personal development. Some challenges that participants encountered in their engagement in leadership development activities were heavy workloads, stress and burnout, lack of leaders' interest in the

employees' development, lack of recognition or inadequate use of new skills, and lack of financial support. When organizations recognize the value of leadership development of leaders or people aspiring to leadership, these challenges can be addressed in order to facilitate employees' growth.

Leadership is often perceived as contained in a formal leadership role, most of which are managerial or senior administration roles. Certainly, these roles require people to have leadership competencies, most likely combined with management and administration. But sometimes, the three concepts (leadership, management, and administration) are used interchangeably. Although they seem to require different skills and have different outcomes, taken by themselves, these three areas may not suffice to fulfill the demands of formal leadership roles. Perhaps, to better understand formal leadership, it would be useful to assess these areas in their similarities and differences and construct a framework that incorporates the three concepts, combined with contextual and situational aspects.

Leadership emerges informally, as well. This means that people can engage in leadership within their sphere of influence, which may contradict the general perception that leadership is contained within formal roles. When we distinguish between formal roles (i.e., job titles) and leadership as capacity to influence and effect change, leadership is not attached to any functions, but perceived as potentially emerging in any role within an organization. In reviewing the literature, I found Youngs' (2017) argument that leadership "holds all other practices together" (p. 146) intriguing. If leadership is perceived this way, then Fullan's (2005) argument that a "critical mass of leaders" (p. 29) as system thinkers is needed for wider change makes sense. Being perceived as potential rather than a threat, informal leadership can be then encouraged and fostered. Thus, organizations are responsible for fostering leadership at all levels. This means providing the space for individuals and groups to make sense of their capacities and identify how they can engage in leadership in their context to influence others and create change.

Wang and Sedivy-Benton (2016) claimed that the gap between theory and practice "continues to widen" (p. 18) and that systemic and organizational leadership issues contribute to this gap. Both the theory and practice of leadership are important in achieving leadership excellence. They inform one another. On one side, engaging in

systematic conceptual research and making connections that go beyond theoretical lenses contribute to broadening one's understanding of leadership. On the other side, continuous reflection and improvement of practices contribute to the development of a wide set of leadership competencies, which leaders can draw from in addressing practical issues. To bridge the gap between theory and practice, one needs to be willing to move beyond the developmental stage to enacting their leadership ethically in organizational practices and maintaining an environment conducive to continuous learning for themselves and for their followers.

It seems that in some ways, participants in this study bridged the gap between theory and practice of leadership by engaging in meaningful learning about the phenomenon, becoming adept to the theory and research in the field, and striving to implement their learning in developing their "good practice" of leadership. Simkins (2005) argued that to be effective, leaders required three types of knowledge, which I believe participants in this study demonstrated, as well: knowledge-for-practice, knowledge-in-practice, and knowledge-of-practice. In developing their leadership practice, leaders need to create space for all three domains of leadership—individual, interactional, and collective. For participants in this study, leadership involved constant personal and professional growth of the leaders themselves, those whom they lead, or their organizations. To equip themselves, they learned "about leadership" by engaging in various forms of education as well as learned "how to be leaders" by applying their learning to practice.

6.3. Contributions to the Field and Recommendations for Future Research

This study contributes to the field of leadership in several ways. Some of these contributions and respectively recommended areas of future research are presented next.

6.3.1. Sharing the Leadership Experiences

This study aimed to find ways to connect the theory, research, and practice of leadership. It also showed that leadership education has the potential to support leaders in developing a broad range of skills and competencies to use in their practice. Building

on Cabrera's (2010) message that the "valuable stories and life lessons emanating from [practical examples] will be lost if they are not recorded" (p. 241), the first recommendation for future research I make is to continue the sharing of leadership experiences, in any form that makes sense to researchers. In this study, I presented a detailed analysis of the stories that participants shared with me and numerous excerpts from these stories to illustrate ideas emerging from them. There is value in learning from others and the journey of leadership needs to continue. In one of my reflections, I wrote that there were four concepts that stood out in analyzing participants' stories when they talked about leadership: confidence, determination, discernment, and humility. It made me curious to research further how these characteristics emerge in people's practice, how they relate with one another and with respect to leadership, and what outcomes they may have when applied in practice.

6.3.2. New Areas Related to the Doctoral Program

Participants mentioned in interviews how the Educational Doctorate in Leadership (EdDL) program contributed to their leadership development, which shows that they found value in the program. In hindsight, maybe asking directly about specific experiences in the program would have provided more insight in how the engagement of multiple perspectives was achieved in dialogue, what contributed to participants' development of skills and attitudes in this area, and how the dialogue in the program helped them with applying these concepts or skills to practice. As well, by asking direct questions targeted to collecting data about the program design, structure, or curriculum, I could have made more specific recommendations for future EdDL programming. During the data analysis, an idea came to mind that would be worth exploring further— whether EdDL alumni stay connected after the completion of the program. If so, to what extent do they continue to contribute to one another's leadership development? If not, are there practical ways to continue to build the community started during the program, and/or extend it to a larger community of leaders? Future research is recommended to explore these topics.

I mentioned earlier that there was little disagreement among participants in terms of conceptualization and development of leadership. When perspective differed, these differences were usually related to leadership implementation in specific organizational contexts. Considering that in conducting the pilot study, participants' perspectives

differed more, I assume that the doctorate contributed to a more uniform understanding of the leadership phenomenon. I recommend further research to find out if, how, and to what extent the cohort configuration affects how students develop their perspectives of leadership and approaches to practice in comparison to the program curriculum, the leadership roles they undertake, or the leadership approach of the organization they belong to. As well, this study included only participants from Educational Doctorate in Leadership programs at one university. To enhance the understanding of the phenomenon, it would be interesting to engage perspectives of people who pursued a doctorate in leadership (in education and/or another field) at another university, other forms of formal leadership education (i.e., undergraduate or master's), or did not engage in such leadership development opportunities at all.

6.3.3. Deeper Contextual Analysis

This study showed that context was key to leadership. Hence, it is important that leaders understand their sector and organization, have broad knowledge of theory and research, as well as develop capacities to explore and adapt their approaches to the needs that emerge in the context where they are implementing their leadership. In this sense, one of the primary goals of leadership education is to help students develop an integrative perspective of the phenomenon, make meaningful connections between theory and practice, and find ways to apply their learning in their context. When talking about the contextuality of leadership in a sector such as the ones included in this study (K-12, PSE, or other), the question is, how much do leadership approaches depend on local or larger context? For example, if the local context has the most impact, are there aspects that could be integrated to create a more general framework, which then can be used in that particular context? If so, what would such a framework look like?

In this study, I did not split the dataset to analyze data based on the sector the stories came from. I was more interested in an overall view of educational leadership. A next step could be to split the dataset and conduct another data analysis within each sector. This approach could reveal contextual aspects that might add depth to the analysis conducted in this study. It may happen that identifying these aspects and finding ways to integrate them would help create leadership structures specific to the sector within which leadership takes place. These issues could be related to the perceived differences between leadership approaches within education (more

hierarchical approaches in K-12 and a flatter hierarchy in PSE settings), or challenges experienced by leaders transitioning between sectors or organizations.

Moreover, considering the areas where participants' perspectives did differ and/or saturation did not occur (e.g., leadership implementation), future research is recommended to explore more closely specific organizational contexts in order to find out if, to what extent, and under what circumstances the approaches to leadership implementation may be transferred to similar contexts. By splitting the dataset and analyzing it further, I could explore how leadership pertains to a specific organization (by analyzing the data about leadership the same organization) or type of organization (schools, departments, etc.). At much deeper level, each participant or group of participants (based on their cohort, roles, or organization) could become a case to study leadership. For the latter, more data would need to be collected for a better understanding of the leadership implementation.

6.3.4. Proposed Use of the Conceptual Framework and Methods

Two contributions and recommendations for future research are related to the conceptual framework and methodological approach used in this study. Bryman (2004) highlighted the increasing contributions of qualitative research to the field of leadership and suggested that researchers build more on previous qualitative research to provide clarity and direction to the field. This study is in a way a response to this call. The conceptual framework constructed for the study is based on the review of a select body of literature, showing how leadership has been theorised while also incorporating previous empirical research as evidence for how the leadership domains and dimensions emerge. The conceptual framework could also guide the design of mixed or quantitative studies, approaches that may reveal additional aspects of leadership phenomenon. It would also be valuable to conduct a search and review of quantitative and/or mixed empirical research to see whether these bodies of literature add to or change the understanding of the leadership phenomenon within the components of the framework. Or, it could be useful to research further whether leadership literature from fields other than education would add new facets to the understanding of educational leadership. Furthermore, the conceptual framework development processes are presented in detail, so they could be replicated to systematically analyze existing literature in other fields of study. Finally, in this study, I used a multi-layer eclectic

methodological approach. I described in depth the steps I took to develop the data collection protocol, how I used it, as well as how I analyzed the data. I hope that other researchers find these descriptions useful in exploring leadership further or studying other topics.

6.3.5. Formal Leadership

Formal leadership seemed to incorporate aspects of leadership, management, and administration. Although terminology used in literature was not consistent, people pursuing these formal roles were considered leaders of people, managers of processes/tasks, and administrators of resources. Issues related to the concepts of management and administration occasionally transpired in my conversations with participants, but as they were deemed outside the scope of this study, rich data about them was not collected by probing for more details in interviews. I recommend further research to explore these topics in more depth, find out how they interrelate, and what areas of responsibilities and skills are required in practice. This could create a better understanding of formal leadership.

6.4. Recommendations for Policy and Practice

Considering the findings of this study, I can make several recommendations for policy and practice. These recommendations pertain to three stakeholder groups: leaders, organizations, and leadership education.

6.4.1. Leaders

Participants in this study highlighted that studying leadership, conducting research, and engaging in meaningful dialogue with others helped them become better leaders. In building a "good practice", leaders need to develop an understanding of how theory, research, and practice interrelate. Through lifelong commitment to leadership development and "good practice", leaders would build a wide range of skills and knowledge, become more aware of contextual aspects of leadership and their spheres of influence, become better prepared to address current and future issues that surface in practice, and remove organizational and systemic barriers. But leaders cannot do this alone. In their endeavours, they need the support of their organizations (e.g., policies,

procedures, and systems) and the people they lead. Thus, leaders should seek support and commit to and find ways to engage others in achieving personal and organizational goals.

Considering the findings of this study, leaders would need to be continuously engaged in personal leadership development and lifelong learning, strive to support others' growth through professional development, and ultimately, build an environment conducive to learning for all members of their organizations. Leaders (formal or informal) need to be prepared to deal with the demands and aspects of their roles. For example, formal leaders need to maintain balance between focus on people and focus on tasks, engage in constructive feedback and behaviour change processes, or address other complex and challenging situations related to people and/or organizations. Informal leaders need to be equipped to identify the need for change, engage in grassroots initiatives, and address issues of power imbalance.

Leadership takes place formally (assigned) and/or informally (emerged). People pursuing leadership education need to be equipped to do at least the following: to recognize, make sense of, and undertake leadership roles when opportunities arise; to possess adequate leadership competencies that allow them to engage in leadership; to be aware of and address issues of power imbalance, accountability, and/or advocacy; and to understand the boundaries of their influence in the context of their leadership. There are a variety of leadership development opportunities available to people interested in developing their leadership capacities—formal, non-formal, and informal. Since formal education is not always possible, leaders should assess and pursue those opportunities that are available and relevant to them in terms of needs, interests, resources, and anticipated outcomes.

6.4.2. Organizations

Organizations have the responsibility to support leadership development, as well as recruit and retain leaders. The findings of this study show that leadership may be assigned or emergent. Leadership development is an important component of practice. As such, organizations should support formal leaders in long-term leadership development opportunities (particularly formal education) and facilitate such pursuits by allocating appropriate resources (e.g., staffing, financial, technology). There were many

approaches to leadership described in this study that were shown to facilitate employees' professional growth, as well as improve employees' well-being, job satisfaction, and retention. Beyond support for formal leaders, organizations should foster the development of leadership capacities in all their employees, regardless of their role. Creating meaningful opportunities for leadership development can help employees become lifelong learners, develop their professional practice, and contribute to the leadership capacity in their organizations. Some participants in this study felt they were part of communities of learning within their organizations. Purposeful involvement of leaders who pursue formal leadership education in training and/or mentorship could benefit other leaders in their organization, including those who do not engage in formal education through such communities of learning.

Considering participants' experiences with "good" and "bad" leader(ship) and the outcomes of such approaches, organizations could create policies and processes to examine individual leadership. For example, specific requirements in terms of leadership qualifications and strategies to assess one's leadership competencies should be an integral part of recruitment for formal leadership roles (e.g., job description, hiring practices, and on-boarding processes). Although it may be difficult to spot a "bad" leader, the organizational culture can be shaped to help leaders better understand their own leadership experiences, perspectives, and approaches. This understanding could help assess their level of preparedness, needs for further development, and suitability for the role or the organization. Formal leaders and their organizations share the responsibility of building a "good practice" of leadership. Leaders should be committed to developing good practices of leadership whereas organizations should be committed to providing appropriate support and resources (financial, human, technological, physical, or cultural) for leaders to apply their learning and be successful in their roles. One without the other is not enough.

6.4.3. Leadership Education

The findings of this study show that leadership is complex, and leaders need to be equipped to approach their practice as the context or the situation encountered requires. The primary goal of leadership education should be to prepare leaders for the complexities of their roles. Thus, leadership education should aim to equip leaders through all planned activities, so that they are prepared for their formal or informal

leadership roles in organizations. In designing curriculum for leadership education, the findings of this study suggest that students found value in activities that offered exposure to theory, research, and practice (e.g., case studies, role plays, readings, discussions, and reflections). Through carefully crafted activities, students can develop the ability to identify what the situations they encounter entail and develop effective leadership approaches.

Participants valued the sense of community and shared learning space created within their cohort. But what if the dialogue extended beyond the program timeline? The valuable dialogue that was established during the coursework could continue and/or even take different forms and have a broader purpose. In this sense, leadership education should foster collaboration not only within but also outside the boundaries of a leadership program. Creating relevant engagement opportunities such as those presented in the findings of this study and promoting them through the appropriate channels could benefit students, alumni, educational organizations, and the larger community of people interested in leadership. These opportunities for networking and dialogue could evolve from a one-time event to a dedicated shared space for people (i.e., students, alumni, prospective students, other leaders) to share their leadership experiences, access different types of knowledge, disseminate research and leadership practices, and build mentoring relationship.

The findings of this study showed that one of the disadvantages of non-formal education was their short-term duration, which did not allow for deeper exploration of issues and dialogue. Hence, leaders pursuing non-formal education should set realistic expectations in terms of the outcomes of such endeavours. However, providers of non-formal education should capitalize on the potential of such opportunities to be more accessible and find ways to strengthen them. For example, the emphasis should be on expanding the programs, hiring qualified instructors/facilitators, and incorporating relevant topics concerning current and long-term issues pertaining to education, and/or issues with wider impact (cross-institutional or systemic). A stronger collaboration between organizations that provide formal and/or non-formal leadership education coupled with careful planning and design of relevant events would allow people seeking leadership development to pursue those most relevant to them.

Formal education usually requires long-term commitment. For participants in this study, the outcomes of the program differed based on their career stages, available opportunities for growth, and career goals. In this sense, stakeholders (students, faculty, organizations, etc.) should assess and if needed, adjust their expectations and level of commitment throughout the course of a program. Participants also highlighted that the structure of their cohorts affected the quality of their learning. Programs should recruit students from a variety of roles, educational settings, backgrounds, and career interests to provide exposure to a wide range of experiences and worldviews. The schedule of classes and the level of support received throughout the program also affected student learning. Educational organizations need to consider a flexible schedule and accessible learning spaces, establish support networks, and/or assist students with creating these networks for themselves. These types of support could improve not only retention and program completion, but recruitment, as well. For example, when recruiting students, organizations should include testimonials about student experiences in the program, related to learning, resources, supports, and challenges. This information is essential especially when prospective students are professionals who need to "make room" in their personal and professional lives for long-term commitment.

Participants in this study emphasized the value of learning (educational component) rather than the outcome (formal credential) of leadership education. All stakeholders—students, instructors, and educational organizations—share the responsibility for learning and teaching in leadership education. Students undertaking leadership education should be committed to their learning, be willing to step outside their comfort zone often, not be afraid to approach difficult topics, and learn from both positive and negative experiences. Instructors should be committed to building an environment conducive to learning, creating a place for difficult conversations, and supporting students in building resilience and becoming reflective learners. Educational organizations should create the appropriate infrastructure, provide adequate resources, and initiate accountability mechanisms for all stakeholders in the design, the development, and the delivery of leadership education. For deep and transformative learning and "good" teaching to occur in leadership education, all stakeholders need to fulfil their part.

6.5. Limitations

There were three limitations identified for this study, which are presented next. To begin with, qualitative research is subjective and generally, relies on previous experiences of researchers and participants (Patton, 2015). Although the study included participants who experienced leadership in various contexts, within and outside education, and the number of participants turned out to be larger (22 participants) than anticipated (minimum 5 participants), the study was not meant to be used to generalize or to describe a larger population or the entire field (Maxwell, 2013; Patton, 2015). Saturation was sought, but not reached for all topics explored. This study encompassed perspectives of people who engaged in formal leadership studies in one program, at one institution, which might have influenced the way they perceived leadership. Even though exploring how participants in this study experience leadership provides valuable insights into leadership, I need to acknowledge the possibility that the way participants perceive leadership is an artifact of the EdDL program they all were part of at some point in their careers. As specified earlier, I did not ask direct interview questions about the doctoral program for two main reasons. First, the program itself was not the focus of this study but used as basis to recruit participants. Second, I wanted to see if participants mentioned their experiences in the program, considering this an indication whether the program had valuable contributions to their leadership development. If participants did not see value in their undertaking the program, then it might have suggested the need for a future program evaluation. However, participants shared valuable insights into the impact that the program had on their leadership development throughout their interviews.

Another limitation is the focus on *leadership* and not on other concepts that overlap with leadership (e.g., management or administration) or may directly or indirectly influence leadership practices in education (e.g., diversity, globalization, gender, and technology). To construct the conceptual framework for this study, I conducted a systematic analysis of conceptual research on leadership and qualitative empirical research on educational leadership. The conceptual framework informed my data collection, analysis and interpretation processes. Hence, the findings of this study need to be considered in the context of the framework that guided the research processes. Although these delimitations were set to ensure manageability and focus, I recognize

that they may have limited my understanding of the leadership phenomenon, especially formal leadership, which, based on this study's findings, incorporates aspects of management and administration.

Lastly, it is the reader who decides the meaningfulness of the findings of qualitative studies. Douglas (2017) acknowledged that "there is a tension in interpretive research between maintaining the voice of the participant and interpreting what they are saying" (n. p.). Although as the researcher, I endeavoured to honour participants' voices in all research activities, at times, I noticed that my own conceptions came into play. When that happened, I reflected on how I related to the concept or the story I was exploring and addressed any issues that I deemed as hindering my presenting the voice of participants. Researcher's interpretation, though an important component of the study, is only part of the process. Through systematic reflection and acknowledgement of my perspective as researcher, as well as several trustworthiness strategies detailed earlier, I assure the reader that the study is not based on my opinion or bias, but in rich and thick data carefully collected and analyzed and that the study represents an accurate reflection of participants' perceptions of the leadership phenomenon (Briggs et al., 2012; Stake, 1995).

6.6. Concluding Remarks

This study aimed to offer a way to connect leadership theory, research, and practice in order to better understand leadership as it took place in educational settings. Being grounded in participants' experiences with leadership, the study provides new insights associated with leadership development and implementation within the individual, interactional, and collective domains of leadership. The study is valuable to researchers, practitioners, and leadership education providers. It is also important to me. Reflecting more on the time I engaged in this research study, I can draw several meaningful lessons, some of which are included in the next section.

6.7. Researcher's Position (Part 2): Lessons Learned and New Possibilities on a Research Journey

This dissertation would not be complete without sharing some of the lessons I have learned on this journey. Along with the first part of my story, which I included at the

beginning of Chapter 3, these lessons bring to light how I related to this study, in all its aspects, what I have learned from travelling in "the dissertation zone", and how this learning fits within the larger picture of my life. But these glimpses of my life as a "researcher-in-training" are not meant to provide a complete account of my experiences on this journey. Somewhere, among the organized chaos that my workspace has become, there is a mountain of scribbles waiting to be (re)discovered. They may become the focus of future stories.

6.7.1. Blending the Art and Science

My experiences with music and technology offered me lessons that are applicable in other areas of life, including how I conceptualized this study. For example, writing or playing good music requires both theory and practice. I have experienced the difference between playing music by ear and following a music score. Some of the best results are achieved when the two approaches are combined. Similarly, connecting theory and practice often results in a better understanding of a topic, including the one I explored in this study—leadership. Often, practicing leadership without strong roots in theory is like playing music by ear. One may be talented and with experience, do great things yet may not fully understand the rationale behind what is done. Or, they may even struggle to move beyond a certain level of performance. Alternatively, theorizing leadership without a place to practice may create an artificial sense of reproducing something, whatever that may be. In a rigid environment where routine is chief, or people know what to do and follow the same "best" practices or "the rules" exactly, without focus on "next" practices and innovation, one may develop reluctance to step outside the ordinary, walk in the "discomfort zone" when needed, or be creative and take risks in approaching new issues.

I also spent several decades immersed in learning about, using, and teaching about technology. There are three major lessons I learned from this experience, which seem transferable to the research process that I engaged in. First, experimenting creatively in the "sandbox" can open new possibilities. There is—almost—always a better approach to solving an issue and what is popular today may be obsolete tomorrow. The idea is to use what you have now to develop a "working product" and remain open to further changes. These changes—often the outcomes of extensive testing—may result in either improving or discarding the product. Second, it is advisable

to break down a complex problem in smaller and more manageable tasks. However, assembling the components into a robust and functional product can be cumbersome and most of the times, the issues encountered are related to the poor communication between components. Third, studying systems taught me not to overlook the big picture, make sense of a technological process, foresee issues that may arise, and be prepared for the unexpected. In the process of conducting this study, there were times when each of these three lessons surfaced. When one of them became the sole guiding principle of my work, it hindered the entire process. Hence, I learned to determine which approach was more suitable to the situation encountered and adapt as needed, but without losing sight of the whole. This study is yet another example of how much more powerful an integrative approach to leadership can be.

6.7.2. The Wonder of Discovery

When I think about how I engaged in various stages of qualitative research and particularly in working with qualitative data, I recognize that every time it begun with interest in something novel. Sometimes, when curious about something, I tend to explore it until I understand it "well enough" or I lose interest. This is probably common. In trying to understand what qualitative research entailed, I surveyed and experimented widely. The journey was organic and authentic. Many times, I felt lost in attempting to understand the depth and width of existing qualitative research concepts and approaches. But when I entered the data collection and analysis, I was deeply affected by participants' stories. My reactions and feelings that their stories evoked were strong and I had to navigate through them carefully and thoughtfully. It is also worth mentioning that every time I started writing a new dissertation chapter, it seemed like I needed to shift my thinking to understand an unfamiliar "type of writing". Approaching writing as previously known did not seem to work. At some junctures, understanding the process of writing in the new way, finding the missing links, and reaching a breakthrough took longer than the writing itself! But I may be reading too much into this.

Some days, looking back, I envision conducting this study as playing a mobile game, one of several I played, particularly on a segment of this journey. Sometimes, for fun. Other times to regain focus or take a break. In a game, one rarely can move to the next level (aka., "level up") without "gaining experience". Some levels take longer to complete and not without performing repetitive tasks. Perseverance is key. Sometimes,

knowing what is unlocked by reaching a subsequent level keeps one from giving up. Focusing on "quests" often brings frustration, especially when completed prematurely since it often reveals more advanced quests, which could take longer or require different skills and resources to complete. This is one the main reason I had lost interest in games over time, aside from being conscious of the time spent (or wasted) playing. But one game was different. I found myself playing it "for fun" and not motivated by completing quests or "leveling up". The quests and levels became part of the experience, but not the focus. Routine tasks became part of play and not merely means to achieve something. That was somewhat a breakthrough. When I became aware of the effect this approach had on my playing games, I also saw research in a different light and engaged in it differently. It was no longer a quest to achieve the next level, the rush to complete, nor the monotony of completing routine tasks. It became a way to experience the wonder of discovery by learning how to experiment creatively… right where I was. This realization kept me grounded and dreaming at the same time.

6.7.3. Tying It All Together

A fond memory I have from this journey is that of a day when we stopped the car on the side of the road, so that I could take a picture. Not of me. But of a sign that signaled a toll bridge to the town of Hope (British Columbia). I smiled at the thought of needing to pay a toll to arrive somewhere—a destination. Why did that sign mean something to me? When I began the doctoral program, I thought I knew myself and I was determined not to let anything change that. Yet, this fascinating journey involved multiple stops, change of direction or speed, and going through some deep valleys of cognitive dissonance—"the learning pits"—each requiring a re-evaluation of some kind, letting go, and finding new strength to continue. It has been, in many ways, both experiential and transformative. In retrospect, this journey helped me "refine my voice", or better said, find my voice of leadership. Not small or strong (but mostly uninformed) as it may have been when I began this journey. Though I cannot say that I have reached my goal of learning *all* there is about leadership—as I was endeavouring before I heard "Stop reading books!"—I am on a path that is worth exploring further. I am content… not because I reached a destination but because I have a clear(er) perspective of the direction I have chosen and the reasons why.

My story is certainly a collection of stories. This research journey helped me make some sense of it. In this light, writing my dissertation as a story of leadership as seen through the eyes of a group of people who pursued an Educational Doctorate in Leadership seemed natural. Many participants expressed their appreciation and anticipation for such endeavor throughout our encounters. We (participants and I) may come from different backgrounds, hold different beliefs and perspectives, and have different personal and professional interests or goals. But on our life journeys, at some point, we all passed through a place where we stopped to learn more about ourselves and plenty from others. And now, woven in the community of leaders, wherever our place may be, we are sharing with others what we have learned, hoping to help them grow, too. The moments of leadership are not always easy, yet every challenge that we overcome brings hope that a difference can be made.

6.7.4. Epilogue

I believe that on some journeys, what one needs to reach a destination is a dependable leader. When no formal leader is found, taking the lead helps. What brings fulfillment, though, is nurturing others to become dependable leaders themselves. Uncovering how this is accomplished by tapping into the wisdom of others has been intriguing enough to keep me traveling this path until the moment I could write … *The End*

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Appendix A.

Initial Invitation

The following initial invitations was sent to 69 potential participants (Educational Doctorate in Leadership at Simon Fraser University alumni) either by email or LinkedIn messaging:

Dear [name of potential participant],

Your [e.g., LinkedIn profile, organization website, etc.] indicates that you have attended a Doctoral Program in Educational Leadership at Simon Fraser University.

I have exciting news for you!

You are invited to participate in a research study I am currently conducting for my EdD Degree. I am doing this study to better understand how educational leaders (you) understand, develop, and practice leadership. I believe that your leadership experiences will provide great insight on the topic and I would be honoured if you would share them with me by participating in my study.

Are you interested in finding more about this opportunity? Feel free to connect with me by replying to this message and I will be happy to provide you with more details about my study and how you may participate in it. I hope to hear from you about participating in this study within the next two weeks. If I do not, I may follow up with you at a later date.

Thank you for your consideration!

Best Regards,

Cristina Eftenaru

Appendix B.

Email: Study Details and Participation

The following email, with the Interview Guide and Consent Form as attachments, was sent to 27 potential participants, who indicated their willingness to participants in the study upon receiving the initial invitation (Appendix A):

Dear [name of potential participant],

Thank you for indicating your willingness to participate in this research study, which is part of my thesis for the Doctor of Education Degree. As per our initial conversation, this email is intended to formally invite you to participate in and provide you with more details about the study.

I am conducting this qualitative multiple instrumental case study to identify what elements of leadership theory are found in the practice of educational leaders by exploring, analyzing, and interpreting how people who pursued doctoral studies in Educational Leadership (EdD) at Simon Fraser University experience leadership. In-depth interviewing will be used to collect participants' stories of leadership. Data will be analyzed to identify themes within and across the cases and triangulated with researcher's reflective data. This study is intended to provide a way to bridge the gap between theory, research, and practice by attempting to map what happens in practice to aspects of leadership theory and vice-versa. Although the study is relatively small and cannot be used for generalizations purposes about leadership, it adds to the literature and it is useful to researchers and practitioners in the field, as well as institutions designing programs with focus on leadership development.

Your participation in this study is voluntary. Attached to this email is the consent form, in which I ask for your permission to participate. If you agree, you will participate in a one-hour interview to share with me some of your leadership experiences. I will ask you to sign the consent form at the interview. I have also attached the Interview Guide to give you an idea about the topics covered during the interview. You may choose to withdraw from the study at any time without any consequences or explanation. If you choose to withdraw, any data collected in the interview will be removed from the study and all notes and other materials associated to it will be destroyed. You may indicate your withdrawal from the study verbally during the interview or before or after the interview by emailing me or my faculty supervisor for this research, Dr. Daniel Laitsch.

There are no foreseeable risks to you in participating in this study. However, if any interview questions may seem sensitive or personal, you do not have to answer if you do not want to. The interviews will be professionally transcribed. Once transcribed, the interview recording will be deleted from all electronic devices. The original interview transcript will be retained by the researcher on a password-protected encrypted drive along with your signed consent form for five years, as per the Simon Fraser University

Office of Research Ethics regulations. The interview will be treated as confidential. Any personal data will be removed once the interviews are transcribed and used as such further. A pseudonym of your choice—provided at the interview—will be used in any reporting associated to this study. You will be provided with the opportunity to check the interview transcript for accuracy and provide feedback on early findings. Data will not be reported in a manner that will identify you or any institutions or individuals you may discuss during the interview.

You may indirectly benefit from participating in this study by having the opportunity to reflect on leadership, in general, and how you and other educational leaders develop and exercise leadership. As the results of this study will be reported as part of my graduate thesis and disseminated through publications and conference presentations to the larger community of researchers and practitioners, others may also benefit from the experiences you share as part of the interviews.

For your participation in this research study, at the interview, you will receive a $15.00 gift card to a local coffee shop. You will receive the gift card even if you choose to withdraw from the study later.

Please keep this email for your future reference. If you have further questions regarding any aspects of this study, please contact me. If you have any concerns or complaints, please contact Dr. Jeff Toward, Director, Office of Research.

Best regards,

Cristina Eftenaru

Appendix C.

Interview Guide

Experiencing Leadership: A Multiple Case Study Exploring Perceptions of Leadership of People Who Pursued Doctoral Studies in Educational Leadership at Simon Fraser University

Interviewer: "Interview #*X* with *Participant Name*, at *Location*, on *Date*, beginning at *Time*. I have received the signed consent form."

A. Participant Profile
1. To begin with, tell me about your current institution, your role, and how long you've been in your current role at this institution.
2. What do you think informs your perspective of leadership? In what ways?

B. Overall Perspective of Leadership
3. Tell me some stories about experiences you've had with leadership that, from your perspective, best define what leadership is or isn't. These stories can be about your own leadership or what you may have observed in others' leadership.

C. Leadership Development
4. Think about memorable times and surprising lessons of leadership. Tell me some stories that are meaningful to you about how you've developed your leadership. These stories can be about your own leadership or what you may have observed in others' leadership.
5. How are you planning to continue your leadership development?

D. Leadership Implementation
6. Tell me some stories about times when you've experienced success or struggle with leadership and how these experiences influenced your leadership. These stories can be about your own leadership or what you may have observed in others' leadership.

E. Closing
7. Is there anything else that you'd like to add?
8. If I need additional information or clarification on anything you shared with me today, could I contact you for a follow up interview?
9. Once the transcript of this interview and the initial analysis are finalized, I'd like to ask you to verify them for accuracy and provide me with feedback. Would you be willing to do so?
10. What pseudonym would you like me to use to identify you in my study?

Thank you for the interview!

Appendix D.

Consent Form

Experiencing Leadership: A Multiple Case Study Exploring Perceptions of Leadership of People Who Pursued Doctoral Studies in Educational Leadership at Simon Fraser University

Principal Investigator: Cristina L. Eftenaru, Graduate Student
Faculty Supervisor: Dr. Daniel A. Laitsch

By participating in this study, you will be interviewed about your leadership experiences. The purpose of the interview is to share your leadership experiences with the researcher in order to contribute to a better understanding of the leadership phenomenon. The interview will be audio recorded and transcribed. The interview recording will be deleted from all electronic devices once the interview is transcribed. The original transcript will be retained by the researcher along with this signed form on a password-protected encrypted drive for five years.

Your interview answers will be used as part of the researcher's graduate thesis and the study results will be reported in publications or conferences, but your identity will remain confidential. To ensure confidentiality, your name and any personal information will be removed from the interview transcript prior to any use (e.g., digital or hard copy) and the pseudonym provided at the interview will be used instead.

You will be given the opportunity to review the interview transcript for accuracy and provide feedback on early findings. You may request additional information about the study by contacting the researcher at any time during the study.

You may withdraw from the study at any time with no consequences verbally at the interview or by emailing the researcher or the faculty supervisor prior to or after the interview. If you chose to withdraw at or after the interview, your interview will be removed from the study and any materials associated with it will be destroyed.

For your participation in this research study, at the interview, you will receive a $15.00 gift card to a local coffee shop. You will receive the gift card even if you withdraw from the study during or after the interview.

If you have any concerns or complaints about the study, you may contact Dr. Jeff Toward, Director, Office of Research Ethics.

☐ I have read the email sent regarding my participation in this research study and my questions about the purpose of the study and the interview have been answered to my satisfaction.

☐ I have read and understood this consent form and I freely consent to participate in the abovementioned research study. I give permission to the researcher to include my

interview answers in any work associated to this interview using the pseudonym provided at the interview.

_____   _____
Participant Signature   Date (yyyy/mm/dd)

_____
Printed Name of the Participant Signing Above

Appendix E.

Systematic Reflections (Excerpts) – Data Analysis

Interview Guide: Why did I ask interview question five?
Entry1—DataAnalysis, November 20, 2018

Even though when I developed the interview guide it seemed appropriate, when my transcriptionist said, "You really like asking question five, don't you?" I asked myself: Why am I asking this question? You could expect that, someone with a doctorate in leadership to answer something like that, "I'm done! I learned everything I need to know about leadership… so, why are you asking how I'm going to continue to develop my leadership?" Or, someone who has been in a leadership role for a while but may not have a doctorate in leadership can say, "I'm done with learning! I'm where I wanted to be—in a leadership role. I've proven myself. I am a good leader. Why are you asking this question?" And then, you may have somebody with a doctorate in leadership and in a leadership role who may say: "I'm done! I have everything I need: a doctorate in leadership, a leadership role... a lot of experience… Why are you asking this?" The list may continue. […] But no one participant responded like that.

I guess at the time of developing the questions, it seemed appropriate to have a question about continuing with leadership development. It may have come from the idea that people are lifelong learners. But just because I enjoy learning, I shouldn't assume that everyone is a lifelong learner. I guess I am trying to find out if participants see themselves as learners. Or, see if there's anything else after the program ends. Do they come into their leadership roles with an open mind, seeking input, encouraging others to share their ideas, seeking mentorship and perceiving the people they surround themselves with as partners in achieving a goal? So, this are some of the big ideas behind that question, I guess… But how about the other interview questions? Should I write more about them, or summarize that's in this table I'm using? [I was referring to a table I was using to rationalize the use of the interview questions. This reflection continued and eventually, it helped me write the Interview Guide description in section 3.6.2.]

Different Perspectives & Similar Experiences (of Leadership)
Entry2—DataAnalysis, November 20, 2018

Not long ago, after a meeting with my supervisor, I asked myself: Why is it so hard to deal with examples from practice that are similar to my experiences? At the beginning of data collection, I thought that (and I was even a bit concerned about it) it would be difficult to deal with perspectives that were *different* than mine. I went through a process to help me with this concern (in itself a long and difficult process for me) when reviewing the literature. It hasn't been enough, it seems…

I am reading this paragraph in one of the first post-interview reflections … it shows that I'm still working on it, but now I'm aware of what's happening, and this is an important step! *"When I heard [participant] mention [this] in the interview, I thought 'No, no… stop talking about it! I don't want to* have *to write about this! Not even think about it… What does this have to do with leadership?' But [participant] did not even heard my thoughts! Did it show in any ways what I was thinking? [the story continued]"* When going through the data analysis, I actually found that what the participant was talking about had in fact, a lot to do with leadership! So, I'm glad I didn't say anything in the interview (how could I have?) and I challenged myself to think about it. Because, after the first few interviews, when I encountered an issue explained in a way that was different than my perspective, I looked at it as being an opportunity for me to reflect on and realize that, as a researcher, my responsibility was to my participants, to keep their voice and/or give them a voice in my study. It wasn't about me and what I thought about a topic. It was about what I found in the field. As researcher, I do have my own leans, but it's not what takes priority […]

When it comes to *similar* experiences, I think I'm dealing with emotions, with how the same emotions surface for me when I hear the frustration and disappointment that other people feel when they share their stories. Sure, some of the examples are emotionally charged … and I found that sometimes, I will postpone listening to an interview, or review the transcript for a time just because I know that there are moments in that particular interview where I'll have to relive the same story and deal with my own emotions. So, it's hard... Again, I found I need strength to actually expose myself again to that particular emotion. [And it happens with both positive and negative stories: containing my excitement that comes with a positive experience, just saying 'hey, this is my story, too! This is so true!' Or, maybe even realizing that I'm not as alone in

experiencing something as I thought. Like when I was reading the literature and realized that there have been others before me who had the same brilliant idea and now, I'm just joining a conversation.] But then, the pain gets harder to deal with every time I listen or read this story… and although I may think that being exposed to the same emotion ... you get to a point where it becomes familiar or you find ways to deal with that particular painful emotion... when it doesn't happen… it seems like the wound gets deeper when you realize that it's not only you and that we are part of the same [scenario]. I'm wondering, is there hope that all good leaders that are in the system now can make change *real*? Time will tell, but maybe not if we're waiting for somebody else to initiate change and fix what's broken. I'm thinking of system change now, not band-aid solutions for trivial or not so trivial practical issues. […]

Emerging Ideas, Questions, & Observations
Entry3—DataAnalysis, November 22, 2018

Examples of side notes on a day when I prepared several Interview Highlights:

- I did not expect to find so much focus on collaboration in interviews

- People in leadership roles show humility, care, and interest in others' growth

- I felt that these three participants talked more about politics and political leadership than I expected (which was zero!). Well, this is because it's not a topic I'm fond of. But I realize that without knowing more (or enough) about it, I'm missing a piece of the puzzle. How big? Or, rather, how many pieces? Maybe I a mentor for this topic…

- How did the EdDL program/cohort influenced participants' perspectives of leadership?

- Do (all) institutions work like multi-functional systems? Why or why not?

- People (actors in one participant's story) were curious; they felt cared for because someone thought of involving them, asking them to share their views.

- Participants used the EdDL program to explore aspects of their practice that they felt they couldn't otherwise. School was seen as a place for guided learning, disciplined learning and use of the masters/experts that could provide students with some assurance of how deep their knowledge on a topic was [example].

Listening to the recordings and reviewing the transcripts so far showed me how, although I covered all *topics in interviews*, the way/order I asked the questions differed. If I were to do this study again, should I try to use my first intended method—just ask people to share their stories with me? At times, I felt that the questions were somewhat forced, and I was asking them just because they were on the guide (nothing wrong with that!). But in some interviews—I think, 2-3 so far, I just asked people to tell me the stories and let them do the talking. Of course, the data are not as organized and will require more work to analyze it. But it was captivating to just listen to their stories.

As I advance in the data collection, I realize how my *post-interview reflections* become longer, there's a bit more depth, but not enough compared to what I'm expecting. So, I'll continue to analyze and think more/deeper about the topics and connections within and between interviews. […]

Highlights are more organized. It may be because by now, I have an idea about the process. And about some emerging themes and possible connections. But this is only the initial stage of analysis. Wow! What a mountain of work I see in front on me […]

I was concerned at the beginning when participants didn't get back to me with a *review of their transcript*. Or even to just tell me that the documents were good. I was challenged to think… I said to myself, 'if transcript verification is a practice that qualitative researchers use to increase trustworthiness, but participants do not respond, then why do it?' I later asked my supervisor and we reviewed the email I had sent, which said 'I hope to hear back by [Date]. If I don't, I'll assume that the transcript and my initial insights on the interview are accurate and can be used as is in my study.' Here it was! Perhaps I should assume that if I didn't hear back, everything looked good. […]

So far, I sent 10 transcripts for verification and I heard back from 6 participants. There were some minor *changes* (words that I didn't quite understand in the recording and other errors. Sorry!). Everyone said how much they enjoyed—in their own way—reading the transcript and remembering the interview. It seems that participating in this study gave people a chance to reflect on their own leadership and share their stories with me, I'm wondering what the rest would say […]

The Analysis Continues: Pilot Testing of Coding Methods
Entry5—DataAnalysis, December 10, 2018

I'm about to start *coding* the first interview and I'll record a few thoughts in the process [description of techniques used for coding] Exciting!

- I noticed from reading this first transcript that the 3 topics [later called primary areas of findings—perspective of leadership, leadership development, and leadership implementation] emerge in many stories throughout the interview. So, I can't say that when I asked about their perspective of leadership, for instance, participants only talked about this topic. It seems that each story has various parts related to the topic… the dimensions or the domains of the framework (where/how will these come into play?)

- I need to note that for the first interview question, I asked about participants' *career* journey, which was not planned when I developed the interview guide. I found that asking about it was important because participants would share stories from other roles and other organizations, so it looks like I made the right choice to add it to the guide!

- I realized that the Interview Highlights could actually be considered the *Case* [initial framing of the study as multiple case study]. So, I'm focusing on transcripts, notes, and post-interview reflections for each participant for now. While reading and coding, thoughts and ideas from other interviews come up and I'm starting to make connections with other interviews. I'll continue with this and see how the data analysis unfolds for a while... [in late December, I wrote on the same page] Hmm, plans don't always work… I hope to complete this cycle of coding by the end of the year. At least for the interviews I have transcribed to date. But the good news is that I sent all transcripts and highlights to participants and I'll hear back in the New Year. After that, I can go deeper into the "forest of qualitative data analysis".

The Lost Memo
Entry6—DataAnalysis, (no date) mid-January 2019

What I noticed in *longer interviews* is that after 40 minutes or so, it feels as if it has come to or it should come to an end. But the interview continues… It's interesting because it feels like the first part of the interview is a warm-up... Ah, building rapport! It may be that people need time to think of their stories, especially if they didn't before the interview or they just shared all they'd thought about. OK, but isn't this what I advise my students for job interviews? Use your most relevant (or rehearsed) examples first? […] I'm reading this last story in the current interview and I'm in awe. I didn't even think about asking something like this, or that I'll even hear something like this in the interview! Hmm, here it is – the need for multiple interviews. Anyways, I'll have to keep going as the process unfolds. For sure, there will be times for follow up. But is it for this study? […]

EdD program: If I were to look back at all the interviews I've done, I see this: giving people a chance to develop flexibility and adaptability, and exposure to theory and practice–this only lays the foundation for leadership. It's (again) about teaching students about leadership through theory and research. Helping students engage in dialogue, offering the space for the dialogue throughout the courses. On Friday nights and Saturday! You need to be committed to spend this much time studying… [Maybe the food or the dessert helped … was there blueberry pie one day?] But what happens after the coursework is done? Where's the dialogue?

I get that *research* is a lonely journey (maybe this is what participants wanted to get at?) […] Some even think that it should be this way, others disagree. So, who's right? Is anyone right or wrong? Maybe I need to look at this from another angle – not all students are/learn the same. […] But if leaders need to be more collaborative (as interviews show) in practice, shouldn't this engagement continue throughout the program? I mean, independent research/work is important. And there's one's own topic to consider, times in research work that need to be spent alone, thinking through complicated processes... However, there could be other opportunities for engagement. Sure, there are people who have the most brilliant ideas when they're stuck at their desk doing lit reviews and transcriptions or working through stats… [or play games, like me] But isn't there need sometimes to detach yourself from work and just talk about it? Like in that movie I saw with the writer that had writer's block!

I liked when participants asked me about my study because I could share verbally what I'm doing. It helped me articulate my thoughts. In the interview I worked on today, I spent a few minutes going through my methods and it was helpful. Other participants asked me too. I remember how in one of the first interviews, I was terrified to talk about my study! I didn't feel prepared at all. It's been helpful to share some of my ideas with others. I see the value in sharing our work with others. I wish we could do more of this as part of the program. And it's not only me saying this […]

Data Analysis Continues: The (In)Famous Coding Book
Entry7—DataAnalysis, February 2, 2019

I've done so much data analysis already! And there is so much more to still do… when I was going through the documents, I realized that the way I was thinking about the *coding book* confused me big time! at first. I knew of one way to do coding and it did not seem to work for this study. So, I tried to find ways to avoid having to create one [and maybe even get away with it]. But then, when I better understood some of the coding methods, I tried some in my data analysis. I saw which ones worked, which ones seemed suitable. How different qualitative research and coding feels! I get it now and this coding process really helped. […]

I am coding today and found this code – "late-career student" – in one of the interviews. It sounded like the participant felt that she didn't have a lot of time to make a difference after completing the program. But she did say that she did as much as she could. Now, she's retired and still looking for places to make a difference. There are more participants who talked about it… I'm making a note to look for what others said about this. […] What if the program were to recruit students in earlier stages of their careers? Would they have more time to use what they've learned and apply to their practice? Would outcomes be different? How? Does timing matter? … Is this part of my own realization that I may be too many years too late doing this degree? No wonder I'm going through a career crisis […]

Data Analysis: Sample List of Questions
Entry8—DataAnalysis, (no date) January 2019

Many questions have emerged while analyzing the dataset. Some were out of the scope of the study, but interesting to write down and possibly explore later. Others were addressed and the answers were included in the dissertation. For example, on one day when I was re-reading a set of transcripts, I wrote down the following questions:

- Why has leadership in education changed? Or, did it?

- Who else talked about "something out of nothing"?

- How about "shared vision"? Is it the same as "having no vision" and creating a vision by collaborating with others?

- Can all voices be included all the time? In this culture of consensus building, what happens with voices that are excluded in decisions even though they're "heard"?

- Do people working in education expect that leaders emulate teaching practices because they're used to this framework and see results in applying it? Who said that leadership is like "good teaching"? [found the reference later]

- Is there a difference between different groups in education (faculty, staff, students, community partners) in how they perceive and/or expect leadership to be implemented? Can I find this in the dataset?

- In this study, participants' perspectives of leadership have heavily been informed by the program curriculum. So, I expect to find themes in how what they'd been exposed to had informed their perspectives and discourse (cohort?). Even if they do not say it.

Reflecting on My Research Process
Entry9—DataAnalysis, February 9, 2019

When I was feeling stuck at the beginning of this study a couple years ago, being a *doer* trying to move forward, I would just choose a group of participants for this research, without thinking too much why. So, seeing this kind of answer in this interview and what other participants say about the study, I feel that I've taken a huge responsibility on my shoulders. And I'm glad I went through the pilot testing phase. […]

Often times, as some said, leadership training is very transactional, without too much thought about *why*. But becoming familiar with theory and research and "forced" to read and reflect on issues … it's eye opening.

Only if would everybody who takes on the monumental task of *leadership* take time to fully engage in the process. Or, find a way to learn more about what leadership is. When we talk about leadership, we talk about people, influencing people… It's not about the correct form (like this participant said) and the mountain of paperwork that most people in formal positions of leadership have to do. OK, that's important, but it's not what or everything about leadership. [Someone said something about balancing between institutional projects and team – I'll have to look for it and see what exactly that was about.] From what I'm hearing, leadership is about leading people toward a goal. It's about helping them find themselves in terms of strengths and ways to engage those strengths to bring change within the context they belong to at any given time. And the task of a leader is to know their people and their context and empower them to use their strengths. It's not about preestablished agendas and *using* people to move that agenda forward. It's not about "my image" and how one can use others and "look good". This may be the difference between "good" and "bad" leadership.

My Experiential Approach to Data Analysis
Entry10—DataAnalysis, February 4 – February 11, 2019

I've been reflecting on what I'm working right now, which is trying to find themes within each interview and then, using the document AllInterviews, I'll be trying to find themes across the interviews. Wherever possible, I'll use the same naming convention for the themes.

I've been thinking about this coding manual (book? system?) which seems to be a very common practice in qualitative research. I am looking at these interviews and the quotes that I've extracted and I'm struggling because I'm thinking about this coding book being required […] and then my trying to learn how to conduct a qualitative analysis. And I'm struggling. A lot. Because I'm using In Vivo coding, I feel that the coding manual, the codes themselves could be the dictionary itself! So, I'm focusing on a manual coding system, for now… which is pretty much writing on the right-hand side of each interview transcript the keywords that I find in the transcripts. Then, when I'm themeing the data

[…] I should somewhat be following the structure of a coding book. So, I'll be looking for a label (which is the theme or subtheme itself), and maybe a definition and short description. Hope this is enough….

I'm doing this analysis very much experientially. Whenever I go back to the textbook and want to write something down, I feel that I'm getting caught in terminology and ways to code and analyze and am not getting very far. But I think I should let the process unfold for me rather than trying to fit what I'm doing in a "box". Letting this wave of creativity unfold will help me. I just don't know how yet. […]

I am coding [participant] interview now and I see how his additions to the highlights help me through coding. In fact, there was a time this morning where I thought I got lost in this interview when trying to analyze it. It's one of the longest so far, and it has so much detail. Which is good, but it's so much work! I will leave it for now… put it aside and I'll come back to it later. I need a break... It seems so much to go through … and I find that it's really important not to get stuck on one interview. […]

I'm going to focus this week on the Theme B stage and then I'll print all themes and work on paper in the next phase. In the analysis so far, what I've found is that the part on *leadership implementation* is the most complex and complicated one to analyze. This could be good since when I'll have to go back to the framework and look for how the domains emerged in practice—individual, interactional, and collective, this is the part where I'll find rich data. The *overall perspective of leadership* is quite straightforward. *Leadership development* is okay. Still, when I have to analyze the interviews that are more story-based, I find that trying to identify themes that emerge is a bit harder. So, I see how much more difficult it would have been for me, an inexperienced qualitative researcher, to have conducted this study using an unstructured interview. If I were to look for the *type* of stories on how people express their believes and *what* stories they tell me and not so much at the content of their stories, an unstructured interview would have been more appropriate. However, because I am looking for aspects of theory, perhaps a semi-structured interview would have been better. […] Maybe, if future opportunities arise for me to engage in further research, unstructured interview (or observations. Wouldn't those be interesting?) is the way to go. Just go talk to people, listen to their stories. […]

[…] Yay! this evening I finished going through all interviews and looking for themes. I have a backup in Vault now. I realized I lost Entry6—DataAnalysis! I hope I can find it somewhere, but there is little chance… I guess this happened when I copied from laptop to HDD and I deleted everything after… [later that evening] I found and scanned two of the pages in pdf! Not totally lost...

I'm still not sure how to write this all up… Do I follow the topics, or do I follow the domains? I guess until I actually go through the groups of themes individually, I'm still going to be confused. It took me more than two months to get here since I started the first coding cycle … and on some days I worked 8-10 hours on it alone… This morning, I realized that in my head, certain words or quotes are linked to were they belong... to which interview, to which participant … the colors (representing the themes) helped […]

I feel that 22 interviews might be a bit too much to handle in a study… maybe Stake was right. After going through 15 or so at each stage, I kind of know the process and I feel it's just a lot more to do of the same… Routine. Or learning? The stories are interesting … and looking at the last few interviews, I find things that were not present in the first ones. It's good to have these many interviews, but it's a lot to manage by one person!

At each stage, the order of the interviews I worked on was different. I thought of this method as being good in allowing me to give the interviews (almost) equal attention. Beginning in the same order always and seeing how it took a lot of energy and motivation to go through all, the latter interviews wouldn't have been given enough thought. Or ideas would have been omitted if they were not appearing in the previous interviews. It was not about the time spent, but the ideas that emerged from each interview. How to better explain this?

[I began writing the Findings Chapter shortly after this reflection, at the beginning on March 2019.]

Appendix F.

Pilot Testing: Interview Debrief

1. Did it help that you had the interview guide before the interview? If yes, in what ways? If no, why?

2. As a participant, is there anything that you expected that I ask, and I didn't?

3. If you were the researcher for this study, what questions would you have not asked? What other questions would you have asked? Why?

4. What is the most interesting/valuable aspect that you see in this study? How about in using this interview guide?

5. What is the least interesting/valuable aspect that you see in this study? How about in using this interview guide?

6. Anything else?