TEACHING THE TEACHERS: A CASE STUDY OF INSTRUCTIONAL LEADER PROFESSIONAL DEVELOPMENT

by

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ABSTRACT

MELISSA MILLER SYKES. Teaching the teachers: A case study of instructional leader professional development (Under the direction of DR. MARYANN MRAZ)

The purpose of this qualitative study was to explore professional development from the perspective of instructional leaders to identify if the assumptions of Knowles's (1990) Adult Learning Theory were present in the planning and implementation of continuing education. For the purposes of this research study, professional development was defined as opportunities for learning offered to teachers to support and enhance teacher practices. An instructional leader is defined as an educator, also known as a learning leader, focused on effective, research-based instruction and strategies. Instructional leaders plan and implement learning opportunities and demonstrate and share their knowledge to encourage student achievement, provide support of practitioners, improve student and educator practice, and promote continuous growth.

A qualitative case study research design was utilized, and the research setting was dependent on the participants and the locations in which they were contracted to conduct continuing education sessions with teachers. The instructional leaders were committed to plan and present professional development at three different suburban schools surrounding a city in the Southeastern United States. The participants in the study were instructional leaders and educational consultants with at least 10 years of experience who work across school districts with multiple elementary, middle, and high school sites in suburban and urban districts. Data sources included two rounds of interviews, observations of planned and implemented professional development, and document analysis of staff development materials. The data were analyzed using thematic analysis that included within-case and cross-case investigation.

DEDICATION

This work is dedicated to my girls, the catalysts that drove me to finish this program, my life-long research study, and the two people in the world that force me to be a better person (even when I don't want to be). My Izzy and Olive - you are my why, my wonder, and my mirror to myself and the world. You have taught me what love is, what kind of person I want to be, and where I fall short. This dissertation is only complete because I felt I must show you what an independent, working mother can achieve when she wants to demonstrate an unwillingness to quit and raise strong women who won't give up regardless of circumstance, obstacles, or heartbreak. If ever you find yourself faltering, unsure of your ability to pursue success, settling for less than who you are or what you deserve, or simply tired of the push and pull of life and people, I hope you pull out this tome (not for reading!) and see my love for you and the strength and determination that you carry with you always. Never make yourself small to fit anything; you cannot be contained and must always fight for yourself and what's right. You are powerful, magnificent, kind, loving, funny, life-long learners who inspire your momma every day (and also drive me a little insane). My life's work is you, only you, the rest is just words on a page. I love you more.

This is also dedicated to a twinkling little star (you know who you are); you are a sun in the sky that kept rising to remind me to look up and make my world bright. And to my mom and dad - this never would have been started without your willingness to always support the girls and I both with your presence and your love. Thank you for staying with me, both figuratively and literally, so I could finish this and complete the academic

journey you started me on as your kindergartener all those years ago. Your love of

learning and push for education made me the educator and student I am today.

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CHAPTER 1: INTRODUCTION

In a world overwhelmed with an overabundance of information and opinion, today's teachers are struggling to find resources that work. Now more than ever, policymakers and school administration are finding that teacher support is essential to ensure student needs and problems of practice are addressed quickly and effectively (Andrews & Richmond, 2019, p. 408; Darvin, 2012, p. 28). In addition, as methods for entry into the teaching profession expand, the need for targeted professional development and "expert" specialized teacher training continues to grow (Darling-Hammond et al., 2017). In a study conducted on professional development published by the National Staff Development Council and The School Redesign Network at Stanford University (2009), American teachers said they felt many of the learning opportunities offered to them are not useful. In 2009, Darling-Hammond et al. found that teachers referred to content-focused continuing education as beneficial, but more than half of participants believed the professional development they received in other areas was not helpful or valuable (Darling-Hammond et al., 2009, p. 5). This reality disconnects with the idea that professional development is a critical element for teachers' instructional practice and pedagogy that meets diverse learner needs (Prenger et al., 2017).

While teachers wrestle with a lack of purposeful learning opportunities, their students struggle to learn, read, and compute. According to the 2019 National Assessment of Educational Progress (NAEP) report cards in Mathematics, "Forty-one percent of fourth-grade students performed at or above the NAEP Proficient level in 2019, which was not significantly different in comparison to 2017, and 28 percentage points higher compared to 1990" (NAEP Mathematics, 2019). In reading, "average

reading scores were lower for both fourth- and eighth-grade students compared to 2017…[and] higher at both grades compared to the first reading assessment in 1992" (NAEP Reading, 2019). These stagnant test scores seem to illustrate a lack of student achievement and a lack of teacher growth to meet student needs and address learning gaps. In response, the past two decades have been defined by national and state reform efforts focused on increased student achievement for all students and accountability measures to encourage growth (Burke et al., 2012).

As the era of No Child Left Behind (NCLB) and Race to the Top came to a close and the Every Student Succeeds Act (ESSA) emerged in 2015, boasting flexibility for states and individual districts to measure school quality, close achievement gaps, and increase student achievement (Lam et al., 2016). In addition, ESSA stated that mandatory testing must still take place at the state level in reading and math in Grades 3–8 and high school, and also required evidence-based plans for supporting struggling learners to be developed (Meibaum, 2016). This reform aimed to be a step towards higher academic standards and more successful interventions for struggling schools and students (Alliance for Excellent Education, Center for Law and Social Policy, & National Youth Employment Coalition, 2016). However, the reality of poor outcomes and student performance, especially among certain populations and those living in poverty, remains despite state interventions and a renewed sense of educational excellence (Beachum, 2018).

As a result of the shift from federal intervention to more state and local control (Beachum, 2018), school plans for teacher professional development and classroom/instructional support is more important than ever—and worth a lot of money.

Continuing through 2020, approximately $2.3 billion per year is authorized for states to improve instruction in the classroom through professional development (Herman et al., 2016). In *Raising the Professional Development Bar to Elevate Educators*, Mesecar (2018) asserted that "combined, federal, state, and local spending on professional development is estimated to be $18 billion – annually." With an elimination of the focus on "core academic subjects" (Association for Supervision and Curriculum Development [ASCD], 2016), ESSA now permits school Title II funds to be used towards professional development that is inclusive of all teachers, including every subject and various staff roles (ASCD, 2016). It also recognizes that teachers learn best from in-the-moment application of professional development and explicitly stipulated "ongoing job-embedded activities that improve instruction" (ASCD, 2016).

This extensive focus on teacher improvement, while necessary, leaves states, school districts, and individual schools tasked with determining what, where, and how they want to invest in improvement strategies that will hopefully transfer to student achievement (Weiss & McGuinn, 2016). One estimate asserted that districts "spend $18,000 per teacher per year..., yet fewer than 1 in 3 teachers report that their professional development experience is satisfactory" (Mesecar, 2018). In an attempt to meet policy requirements, issues with teacher competency and/or effectiveness, and student needs, many districts and schools are turning to educational consultants, instructional coaches, principals/administrators, and teacher leaders to present professional development sessions to staff at both the county and school-wide level. Identifying these instructional leaders to manage learning and improve pedagogy is founded in the hope that placing a priority on providing teachers with instructional

sessions on high-impact strategies and best practice topics will translate to classroom practice and student achievement.

One measure schools have implemented as a result of ESSA funding is the inclusion of instructional leaders who work specifically to develop teacher effectiveness and student achievement. Not only does this type of job-embedded teacher professional development allow for immediate feedback to improve teaching and learning in real time (Driscoll, 2008; Knight, 2006), but when effective, these teacher-educators focus specifically on enhancing practitioner practice by planning and implementing whole group professional development that is determined as needed by individual teachers, schools, and/or principals (Driscoll, 2008). In *The Art of Coaching*, Aguilar (2013) stated that teachers most often improve their instructional practice through professional development. Yet in their *Mirage* report, Jacob and McGovern (2015) found that while teachers are "spending approximately 19 full school days a year—nearly 10 percent of a typical school year— participating in development activities," these hours are not translating to substantial yearly improvements. Despite spending almost a year participating in professional development over a ten-year teaching career, teachers are not becoming more effective as demonstrated in student achievement scores. In fact, "as many as half of teachers in their tenth year or beyond were rated below 'effective' in core instructional practices, such as developing students' critical thinking skills" (Jacob & McGovern, 2015).

With schools offering an average of 24 hours of formal professional development per teacher per year (Mesecar, 2018) and districts funding full-time instructional leader positions for teacher education, it can be argued that schools are investing heavily in

continuing education as a tactic for improvement of instruction (Miller et al., 2008) and a vehicle of change for improved?? student and teacher outcomes. However, this school expenditure is difficult to quantify (Ferguson, 2016). At the end of every professional development session, teachers pack up and leave, only to return to their classrooms to work in the areas of planning, instruction, and assessment with a kaleidoscope of variables that impact both teacher performance and student achievement (Chenoweth, 2016). In an effort to understand professional learning outcomes further, an examination of the perceptions of those who plan and implement continuing education (instructional leaders), as well as an investigation into presented staff development content through a lens of adult learning theory, can help to dispense a comprehensive view of whether professional development is planned and implemented in a way that will be valuable and effective for the practitioners for which it was created.

This research aimed to study the ideas and theories of instructional leaders, as presented through analysis of adult learning theory. Specifically, the study explored the ways instructional leaders do and do not consider adult learning realities in their practice. The planning and implementation of professional development utilizing adult learning theory assumptions were explored from the perspective of those who plan and implement practitioner learning opportunities. While there is research that investigates what constitutes effective professional development practice, there is little research that examines the perspectives of those who plan and implement continuing education sessions. Insight into this area is needed so that professional development can be more targeted and purposeful to truly alter teacher practice that translates to impactful instruction for student learning.

Statement of the Problem

According to both teachers and policy makers, professional development and practitioner education is essential for growing teacher effectiveness, instruction, and student proficiencies (Darling-Hammond et al., 2017). Improved instruction translates to student achievement, mastery, and learning outcomes (Mangiante, 2011). At present, most teachers are frustrated with both student outcomes and their ability to support student understanding. In addition, schools and districts are scrambling to plan, create, and implement quality professional development in an effort to meet the challenge of supporting teacher's abilities to meet student needs (O'Hara & Pritchard, 2008).

Working specifically to address teacher education and support effectiveness and student achievement, those who are responsible for planning professional development, including instructional leaders tasked with practitioner growth, can be sucked into the vortex of what Knight (2006) called the "attempt, attack, abandon cycle," and thus, perpetuate teacher continuing education that results in "an unmerry-go-round" of poorly implemented and/or received sessions that result in a lack of "any meaningful, sustained change in instruction taking place." While principals and school leaders play a significant role in supporting teacher effectiveness and addressing problems of practice, many times the tenants of adult learning theory are lost in the shuffle among time and money constraints (Donaldson, 2013).

In their study of school leaders as participants in teachers' professional development, Hilton et al. (2015) asserted that continuing education plans and programs do not recognize or address how practitioner-change transpires. As such, this study sought to explore adult learning theory as applied to professional development planning

and implementation (Knowles, 1990). Specifically, in an effort to increase understanding about the outcomes of professional development, this study examined professional development planning practices from the cross-case analysis of three instructional leaders and investigated these practices by applying adult learning theory principles (Knowles, 1980, 1990). In addition, this study addressed the perspective of instructional leaders responsible for planning staff development and focused on professional development implementation as a form of adult learning. More research needs to be made available on these constructs and the idea that to improve teacher effectiveness and student achievement, professional development must address the tenants of adult learning theory.

Statement of Purpose

The purpose of this qualitative study was to explore professional development from the perspective of instructional leaders such as independent consultants, principals, and instructional coaches to identify if the assumptions of Knowles's (1990) Adult Learning Theory were present in the planning and implementation of continuing education that aims to "change the way teachers teach and how much students learn" (DeMonte, 2013, p. 4). For the purposes of this research study, professional development was defined by Paechter (1996) as "an activity in which the individual and the group interact to develop better models for practice which preserve the best of professional autonomy while promoting the sort of reflective culture that encourages constructive, cooperative change" (p. 354). In an attempt to encourage practitioner growth through professional development opportunities, schools and districts have launched several methods of "helpful" teacher support to alleviate the

pressure of floundering teacher practice and unmet student needs (Jacob & McGovern, 2015). Drawing on the notion of standard of care from the medical profession and applying it to education and preK-12 teaching, it becomes evident that it is necessary for every teacher to reflect and enhance skill levels based in content knowledge, pedagogical practice, learning theory, and technology via well-planned professional development that aims to enhance instructional practice to positively influence student learning (Youngs, 2013, p. 2). Despite attendance at professional development sessions several times a year and regardless of the many hours teachers are sent to focus on their practice with instructional gurus, teacher effectiveness and student achievement are not increasing, leaving schools to seek out solutions despite a panacea of professional development offerings.

This study sought to investigate the ideas and theories instructional leaders use to plan and implement professional development and explored how adult learning theory assumptions align with instructional leader beliefs and practices. Not only does this research allow education stakeholders to gain an understanding of how teacher-leaders are creating professional development, but it also informs stakeholders on how planning and implementation of professional development recognizes adult learning opportunities. Additionally, the research can advise school districts offering in-house professional development and outside consultative experts in the field how to best support teacher learning for practitioner change. Finally, it allows for future research on adult learning with regard to continuing education and increased effectiveness.

Research Questions

This study utilized an adult theory lens to examine instructional leaders' ideas, perceptions, and practices of professional development planning and implementation. The study participants included three instructional leaders who each have more than 10 years of experience teaching, leading, and coaching educators and students in traditional K-12 environments. All the participants also act as independent contractors who plan, present, and implement professional development as part of their primary or supplemental income. An instructional leader, also known as a learning leader (Jenkins, 2009), has been defined as an educator whose role includes the management of teaching and learning (Lachlan-Hache, 2017). This study was focused on collecting data to better understand instructional leaders' approaches to planning and implementing professional development and explored how participants do and do not recognize adult learning realities in their practice. This research was guided by the following questions:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

Significance

Teacher professional development supports teacher effectiveness and teaching ability (Ball & Cohen, 1999; Cohen & Hill, 2000; Darling-Hammond & McLaughlin, 1995; Elmore, 1997). Explicitly taught strategies impact student achievement (Moje, 2015; Goldman & Snow, 2015, p. 463); Torgesen et al., 2007). For professional development to be most effective, it is essential to understand the perspectives of those who plan and implement staff development because adults bring a different set of learning needs that must be considered (Darling-Hammond, et al., 2017; Matherson, & Windle, 2017). This study has the potential to add to the body of knowledge about effective professional development and the incorporation of the assumptions of adult learning theory by increasing instructional leaders' capacity to provide quality continuing education opportunities. In addition, providing information about the support teachers receive from professional development, adult learning opportunities, and the planning and implementation of staff development is important to address the current climate that emphasizes practitioner change.

There is limited research about professional development planning and implementation with regard to adult learning theory assumptions in the field of school-based teacher education; instructional leader interviews and generated documents, as well as a content analysis of professional development sessions, may give insight into more effective continuing education planning and implementation practices and yield more purposeful professional development offerings and learning opportunities for teachers?. The intent of professional development is to support teachers' abilities and enhance teacher instruction; this study sought to determine if

professional development created by instructional leaders for teacher growth recognized the tenants of adult learning theory.

Subjectivity Statement

This subjectivity statement is included to disclose all related experiences of the researcher. My research has multiple connections to my work and life as a teacher and instructional specialist working with beginning and veteran teachers. After years of attending and working in schools, I have become ingrained in the academic culture and lifestyle. I know what it is like to try and support teacher growth and to present to a room full of exhausted, frustrated educators who are desperate for strategies and ideas that will help them teach and manage their students. I am fascinated with classroom and teaching dynamics, the "no sense" mandates and procedures of education, and the slow progression within the field with regard to innovation and technology. More specifically, I am interested in learning how professional development and continuing education can enhance educator effectiveness and instructional leaders' perceptions and attitudes regarding continuing education experiences.

This qualitative research study provided the opportunity to explore the perspectives of learning leaders regarding their experiences planning and implementing professional development with consideration of the assumptions of adult learning theory. I have a vested interest in this topic because as a district-level content specialist working to support instructional effectiveness and student achievement, I understand that professional development and the ability to learn teaching strategies and planning procedures can shape learning outcomes and impact an educator's ability to succeed both

with students and within the profession. That said, as a middle and high school English teacher working in urban, high needs schools for over 18 years, I also know that support and continuing education for teachers working in the field is rarely effective and seen by most teachers as a waste of time or an appreciated break from the classroom. Many times inconvenient and all the time mandated rather than self-selected, professional development to me has rarely been beneficial and very frequently left me frustrated and feeling that my superiors were out of touch with reality. In addition, session outcomes and activities made me feel incompetent and disregarded my experiences and knowledge base. I know the defeat of working with struggling, hard to engage students and the desperation of needing different ideas and strategies that can make a difference.

Due to my background and role as a content specialist, I believe that professional development is an important part of improving teacher effectiveness and student achievement. I understand that sometimes as a teacher you don't know what you don't know and many times no one seems to know the answers. I also know that this reality can become harder and harder to swallow as you move from a novice teacher to a more seasoned educator. I believe that learning has made me a better educator and I believe that this can be true of all teachers.

By virtue of my experiences, I also know that continuing education takes time, resources, and availability that is nonexistent under current teaching conditions. In most districts across the country, teachers are told to do more with less and money is only allotted for professional development that aligns with school or county initiatives or those topics deemed worthy by building leaders. My passion has always been in finding ways to support teachers to increase student learning and become less of a slave to their

profession. Due to this belief, my role as an educator and instructional leader is deeply

ingrained and grounded in a desire to better a previously lived experience. For the

purposes of this study, I focused on instructional leaders with regard to the planning and

implementation of professional development as an adult learning experience. I did not

focus on or include my opinions of teacher effectiveness when considering adult learning

assumptions. As a strategy to keep my focus on the collected data, I recorded any

thoughts unrelated to the study purpose via personal notes that do not relate to my

research questions and are not to be included in the study.

This work is focused using a constructivist paradigm. Mertens (2015) asserted

that qualitative research utilizes a constructivist approach through acknowledgement

of participants' multiple socially constructed realities. Teacher and learning leader

perspectives vary based on their own experiences and perceptions. Instructional

leaders' understanding of adult learning theory, professional development planning,

and implementation of practitioner learning sessions is impacted by various factors;

this research does not assert there is one definitive answer. Instead, the opinions of

participants contribute information about teacher professional development that can

help support the profession.

Definition of Terms

Instructional Leader: an educator, also known as a learning leader, focused on

effective, research-based instruction and teaching practices who plans and implements

learning opportunities and demonstrates and shares their knowledge to encourage

student achievement, provide support of practitioners, improve student and educator

practice, and promote continuous growth

Andragogy: the practice of educating adult learners

Professional Development: opportunities for learning offered to teachers to support and enhance teacher practices; includes the terms staff development, continuing education, and professional learning opportunities.

Summary

This study examined the perceptions of instructional coaches and teachers' professional development experiences, as well as explored how adult learning assumptions are integrated into the planning and implementation of professional development. In Chapter 1, the basis for this qualitative study was explored. While literature on teacher professional development and instructional leaders as creators of learning opportunities exists, the field is lacking explorations focused on learning leaders' theories and ideas regarding professional development, how their planning and implementation relates to adult learning theory, and how the assumptions of adult learning theory are present via instructional support. In Chapter 1, the problem, purpose, significance, and theoretical framework of the study was explored. Chapter 2 explores the literature focused on professional development, instructional leaders, and adult learning theory in educator professional development. The chapter starts with a review of professional development. Next, the best practices and various forms of continuing education are explored. Finally, research on adult learning theory, andragogy, and the assumptions that impact teacher growth and change is shared. The chapter includes the challenges related to professional development planning and implementation. The methodology and research design for the study is described in Chapter 3.

CHAPTER 2: LITERATURE REVIEW

This study explored instructional leader process, planning, and implementation of professional development to identify if the assumptions of adult learning theory were present in practitioner continuing education. This chapter offers a review of the research to date related to professional development planning and implementation. In addition, the chapter begins with the history and best practices of professional development and leads into a discussion of the roles of instructional leaders with regard to practitioner education. Next the theories of andragogical practice are explored, including a description of Knowles's Adult Learning Theory. Finally, the impact that andragogical assumptions have on adult learning and teacher professional development are reviewed.

Professional Development

The research suggests that the quality of educators is imperative to the achievement of students and effectiveness of teachers (Organisation for Economic Co-operation and Development [OECD], 2015). Effective professional development for teachers leads to increased quality of instruction and positive student outcomes (Sharma & Bindal, 2013; Timperley & Alton-Lee, 2008). With teacher certification and licensure methods spanning multiple modalities, and student and classroom dynamics and realities becoming more diverse, it is clear that success for all students and teachers is dependent upon individual professional learning and the capacity of organization leaders to plan purposeful growth opportunities, solve problems, and encourage skill renewal (Sparks, 1994, p. 5).

Known by many names—in-service education, staff development, professional development, or continuing education—teacher educational opportunities many times

require educators to passively "receive" learning from experts who "expose" teachers to new ideas and indoctrinate them into new practices with the promise of solving problems (Sparks, 1994, p. 2). According to Harvard University Professor Heather C. Hill, the "professional development 'system' for teachers is, by all accounts, broken" (as cited in DeMonte, 2013, p. 1). However, professional development is touted as an indispensable part of the plan to reconstruct and rejuvenate American education (Dilworth & Imig, 1995, p. 8), and schools are relying on staff development sessions to "fix" student achievement gaps and teacher effectiveness ratings.

The trajectory and purpose of school-based continuing education has been varied, but one consistency over time is the significant investment schools have made in developing their teachers (Sharma & Bindal, 2013; Patton et al., 2015). It has become evident that in order to achieve the valuable outcomes that only emerge from continuous, supportive learning opportunities and environments that cultivate deep thinking and significant mastery across varied contexts, all stakeholders invested in student achievement and teaching effectiveness must continuously elevate his or her educational capacity (Claxton et al., 2016; Sparks, 1994). In fact, purposeful, quality professional development has been mandated continuously via national and state reforms, with the most recent order having occurred in 2015. The Every Student Succeeds Act (ESSA), a replacement to the "adequate yearly progress" focused No Child Left Behind (NCLB) bill, attempted to recognize instructional realities and address them by providing states more control over local accountability measures for student achievement (Lam et al., 2016). Essentially, ESSA required schools to create a plan for measuring student performance and identify ways to support struggling learners (EdWeek, 2015). In

addition, ESSA promoted the idea of personalized interventions to meet the needs of

struggling schools based on state assessments (Weiss & McGuinn, 2016).

  Title II funds within ESSA were designated for improvement of instruction and

professional development support (Herman et al., 2016), and in an effort to try and meet

the needs of failing learners, schools have designated a significant portion of their budget

to teacher continuing education. The move makes sense in that ongoing professional

development has been found to be an important component of teacher effectiveness, and

when applied to education and K-12 teaching, the research demonstrates a need for

teachers to routinely participate in learning opportunities that promote new content

knowledge, pedagogical skills, theories of learning, and technological proficiency to

target "appropriate and effective instructional practices that will promote student

learning" (Youngs, 2013, p. 2).

  Teacher effectiveness is aided by quality professional development; approaches to

professional development must be studied to both address current teacher knowledge

gaps in the field and adequately meet teacher continuing education needs in order to spur

student learning and growth (Sharma & Bindal, 2013).Therefore, the expectation that

educating instructors results in more positive student outcomes, while grounded in

research (Beachum, 2018), is dependent on the quality of learning opportunities offered

to teachers and the incorporation of appropriate methods for adult learners. Under ESSA,

schools' attempts to support struggling learners and meet required student growth goals

through continuing education is an effort to translate teacher learning into reported

student outcomes (Ferguson, 2016); however, this solution is only as good as the

planning and implementation of the professional development that is offered to teachers.

Practices of Teacher Professional Development

The importance of professional development is evident throughout many industries, but especially in the field of education. Relevant to all levels of teacher experience, effective professional education must encompass the theories of learning in order to change participants' actions, beliefs, and knowledge to promote growth and enhance skills (Halim & Mozahar Ali, 1997, para. 3). It must also be recognized that pedagogy, the practice of learning for children has been erroneously applied to professional development when andragogy, the study of teaching knowledge and skills to adults, is a better fit for teacher staff development (Halim & Mozahar Ali, 1997, para. 4). While professional development may be foundational for structured reform that results in increased practitioner practice and pedagogy (Desimone et al., 2002, p. 81), it is important to note that the inclusion of adult learning theory in continuing education sessions, as well as educator beliefs regarding teaching practices, learning, and professional growth, may impact teacher performance and inhibit their ability to learn (Dilworth & Imig, 1995).

Varieties of Professional Development

Quality in-service staff development is "a problem-centered, learner-oriented, and time-bound series of activities" led by an instructor who acknowledges professional experience, offers participants opportunities for agency and purpose, expands understanding of practice, and extends knowledge competency and mastery of skill (Halim & Mozahar Ali, 1997, para. 7; Waring, 2016). When applied to individual levels of teacher experience, professional development serves different purposes for educators at various points in the field. Diversification of professional development approaches and

intent is dependent on the instructor planning and implementing the learning sessions for teachers. An instructional leader focused on staff development must not only understand what support is needed in the moment but also recognize the realities of adult learners and the stage they are at in their teaching career.

One type of professional development offered to educators is pre-service training. Focused on providing those individuals initially entering the field basic skills for surviving, many times this staff development does not recognize the adult learner and assumes the participant has no experience because they are new to the profession (Halim & Mozahar Ali, 1997, para. 9; Waring, 2016). For pre-service and student teachers, this professional development aims to address the discontinuity that occurs between teacher preparation programs and standards-based realities. While the focus of pre-service training usually underscores content and technical subject matter (Halim & Mozahar, 1997, para. 9) and ideally integrates theory and practice, many times this staff development ignores learner agency and instead promotes the idea of "Do-as-I-Say" instruction (Desimone et al., 2002, p. 82). The research implies that effective teaching is a process that can be learned; "the notion that someone is born to teach is simply inaccurate" (DeMonte, 2013, p. 2) and professional learning opportunities need to recognize this reality.

Another type of professional development offered to teachers is induction or orientation training; this type of professional education most often occurs as a method for assumption of roles and is intended to familiarize staff to their positions, acquaint teachers to new initiatives and programs, and promote the practices of the organization and the methods most commonly implemented (Baker, 2010; Halim & Mozahar, 1997).

For novice and experienced teachers, this professional development tends to encourage teachers to improve performance based on assigned job responsibilities and provides educators with a rationale for their learning, albeit one that is focused on the collective rather than individual needs. This professional education promotes the concept of individual growth with relation to the staff as a whole (Halim & Mozahar, 1997, para. 11; Kennedy & Heineke, 2016) and endorses independent problem solving and self-reliance in instructional decision making (Baker, 2010; Dilworth & Imig, 1995, p. 10; Osamwonyi, 2016). Furthermore, foundational staff development promotes technical competence and routine instruction regarding the organization, with a focus on ensuring that "every staff member [has] some professional knowledge about various rules and regulations" (Halim & Mozahar, 1998, para. 12; Osamwonyi, 2016). This educator learning opportunity, while indirectly addressing some problems of practice, forgets practical needs and focuses instead on expert solutions to fix the problem.

Despite their dedication to the students and the profession, many times experienced, veteran educators are not considered with regard to professional development needs and wants. However, it is through targeted professional development that the practice of teaching can be improved and teachers can learn to teach better; well planned and thoughtfully implemented staff development can encourage mastery of skills that do not simply occur with experience or time in the classroom (DeMonte, 2013, p.2). Professional development for practicing teachers has less of a focus on "the transfer of knowledge and strategy and more on analytical and reflective learning" (Dilworth & Imig, 1995, p. 10). One type of continuing education offered for those experienced in the profession is maintenance or refresher professional education. With an intent to update

and maintain functional subject-matter knowledge, participants are encouraged to add to their existing knowledge and skills, review previously taught information, or learn new skills and methods (Halim & Mozahar Ali, 1997, para. 13). Additionally, career or development training is implemented with the goal of advancing teacher knowledge, skills, and abilities to encourage the undertaking of greater responsibility and increased professional practice (Halim & Mozahar Ali, 1997, para. 14). This type of training is usually arranged departmentally for successful extension and application at all levels, yet many times there are gaps between planned learning opportunities, teacher need, and learning leader recognition of adult learning realities and the importance of andragogy.

An essential aspect of professional development is to "specify strengths and weaknesses in instruction and help teachers improve their professional practice" (DeMonte, 2013, p. 11). When considering the assessment of teachers and students, the goal of teacher-instructional leader relationships is to administer specific feedback about a teacher's practice in order to highlight areas of improvement and in turn, offer a more personalized learning opportunity (DeMonte, 2013, p. 11). The need for effective professional development leaders and supportive partnerships is evident when identifying the types of learning opportunities offered and evaluative realities within which teachers work and students learn, including value-added models, teacher performance assessments, and results-driven expectations. Based on student achievement data that assesses teachers' effectiveness without considering instructional support or proficiency, value-added models "attempt to explain the contribution of particular teachers to student achievement gains over time" (Youngs, 2013 p. 19). While value-added models can be used as a form of accountability for teacher aptitude and growth (Youngs, 2013, p. 21),

they can also be used to promote or dismiss teachers who struggle and need targeted, purposeful learning opportunities that acknowledge their experience and connect to their capacity as professionals (Youngs, 2013, p. 22); these models also can make it seem that teachers are not learning or implementing professional development knowledge when really the continuing education opportunities offered may simply be lacking. Teachers are working in a time when value-added accountability alerts the need for clear, measurable reform that "call[s] for teachers to participate in professional learning, set high expectations for all students, and alter their instruction in significant ways" (Youngs, 2013, p. 21). However, many times the continuing education opportunities offered to teachers do not deliver what is needed, do not apply to current teaching realities, and do not consider who teachers are as adult learners.

Roles of Instructional Leaders

With school districts investing heavily in continuing education for their teachers (Patton et al., 2015) and instructional improvement increasing the overall achievement for students (Timperley & Alton-Lee, 2008), instructional leaders designated to lead professional development initiatives and plan and implement ongoing education are essential for both teacher and student learning outcomes (Kimball & Milanowski, 2009). The designation and title for a school-based instructional leader varies; at some schools this role is filled by principals or assistant principals who are charged with determining professional development topics and delivering staff development (Lutrick & Szabo, 2012). In some educational settings, literacy coaches are the point person for teacher learning opportunities, plans, and outcomes (Bean et al., 2015). While at yet other locations, instructional facilitators, coaches, and district central office staff are

responsible for staff development reforms aimed to improve teaching and learning in all schools (Honig, 2012). Regardless of their professional title, the goal of an instructional leader with regard to teacher educational opportunities is to "move away from occasional professional development...to prioritizing ongoing, intensive, job-embedded support to...improve classroom instruction" (Honig, 2012).

Defining Instructional Leaders Roles and Responsibilities

Instructional leaders and the work they do influence teacher effectiveness through professional development (Donaldson, 2013). In addition, leading and supporting teachers in the learning and implementation of new programs and improvement plans is important to ensure all teachers are provided with a foundation of understanding (Timperley, 2008). That said, the titles, roles, and responsibilities of an "instructional leader" vary and are highly dependent on funding, focus, and capacity (Kennedy, 2016). For the purpose of this study, an instructional leader was responsible for "building [the] capacity of teachers to help students learn" (DiPaola & Hoy, 2014). In addition, this study utilized the National Association of Elementary School Principals' (2008) definition of instructional leadership to define instructional leaders who plan and implement professional development with teachers. NAESP (2008) defines an instructional leader as having six roles: leading student and adult learning; setting high expectations and standards; ensuring content and instruction to standards and achievement; creating a culture of continuous learning for adults; utilizing data to inform and assess learning; and actively engaging the community for support and school success.

According to Blase and Blase (2000), behaviors of instructional leaders include giving feedback and suggestions, modeling instruction, supporting collaboration among learners, providing professional development opportunities, and sharing positive feedback for effective outcomes. The goal of instructional leaders is to support teacher practice that translates to student growth; these leaders aim to encourage compelling methods for education. Furthermore, the push for instructional "experts" is directly tied to federal law and funding in that the preparation, training, and recruiting of teachers is one of the foundational methods for addressing gaps in student achievement and proficiency across the nation (OECD). Current social and educational context, combined with high-stakes accountability and district and school need for advances in instructional proficiency, requires instructional leaders to support their learning communities in ways that allow both teachers and students to reach their highest potentials (NAESP, 2008). Planning and implementing professional development is just one of the ways that instructional leaders assert their role as change agents in schools; their understanding of how humans learn must also be present in their practice and demonstrated via staff development in order for them to meet the needs of teachers and provide evidence of successful support of educators and learners (Jenkins, 2009; Lashway, 2002).

Effective Professional Development Structures

It is easily understood why teachers must be supported by instructional leaders through professional development initiatives, especially with new models of rigorous teacher-evaluation systems encouraging uncompromising school-reform across the nation (DeMonte, 2013, p. 10). With educators no longer being rated on a binary scale, but instead being appraised on a four or five-point scale (DeMonte, 2013, p. 11), results-

driven staff development for educators is a necessity for both teachers and their students.

In fact, successful staff development will be "judged primarily not by how many teachers

and administrators participate in staff development or how they perceive its value, but by

whether it alters instructional behavior in a way that benefits students" (Sparks, 1994, p.

5). Various elements, including content, quality of the professional development offered,

and school climate and culture affect the impact of staff development and the likelihood

that teacher continuing education leads to positive student outcomes (Dilworth & Imig,

1995, p. 12; Guskey & Sparks, 1991).

While professional development programs should always include all stakeholders

that have influence on the implementation of desired changes for both teachers and

students (Hooker, n.d.), it is the structural characteristics of professional development

activities offered that affect the core features of the activities. Professional development

features are the catalyst for practitioner change and have influence over how successful

the staff development experience is with regard to increased teacher knowledge and skills

(Desimone et al., 2002, p. 108). In order to be effective, instructional leaders who plan

continuing education opportunities should pursue professional development that utilizes

activities that encourage collective participation and sustained teacher reflection

(Desimone et al., 2002, p. 108). In studies conducted on the characteristics of

professional development, the majority of continuing education sessions offered to

teachers demonstrate that high quality characteristics like coherence are present much

more often than elements like active learning and collaboration (Garet et al., 2001, p.

935). The research also implies that there are certain characteristics of "high quality"

professional development that when incorporated into staff development result in more

positive outcomes; these characteristics include "a focus on content and how students learn content; in-depth, active learning opportunities; links to high standards, opportunities for teachers to engage in leadership roles; extended duration; and the collective participation of groups of teachers from the same school, grade, or department" (Desimone et al., 2002, p. 82). Staff development that contains a high concentration of activities focused on specific teaching practices (content focus) results in more frequent practitioner implementation of the highlighted practices (Desimone et al., 2002, p. 102). The research evidence suggests that professional development focused on specific teaching practice will increase teachers' use of those practices in the classroom (Desimone et al., 2002, p. 102).

The National Staff Development Council (2001) argued that effective staff development emerges not from implementing a determined set of "best practices" but instead requires instructional leaders to plan and implement professional development that adapts "varied practices to specific content, process, and context elements" (Guskey & Yoon, 2009, p. 497). When looking at the structural features of effective educator learning opportunities, form, duration, and participation must be considered. Other core features of effective professional development include a focus on content that connects to practitioner teaching and aligns with existing standards and goals, active learning that results in meaningful discussion and resources, and coherence that considers school contexts and is data-driven and outcome based (Darling-Hammond et al., 2009; DeMonte, 2013; Desimone et al., 2002; Frampton et al., 2002; Garet et al., 2001; Guskey & Yoon, 2009; Inger, 1995; Sparks, 1994; Wood & Thompson, 1993; Youngs, 2013). When considering structural form features, instructional leaders should rely less on

traditional approaches such as workshops or conferences (Birman et al., 2000, p. 29) and more on "reform" activities such as study groups, mentoring relationships, or committees or tasks forces. This shift not only acknowledges how teachers learn but also allows practitioners to have more agency over changing their teaching practice (Birmanet al., 2000, p. 29). Sustained activities with a greater focus on subject-area content, active learning, and more parallels between teachers' experiences have greater impact and increased positive outcomes on teacher practice and staff development experience (Birman et al., 2000, p. 30). Collective participation is more likely to be coherent with teachers' other experiences and allows for practitioners to assimilate new learning with current understandings of instructional content and teaching practices (Birman et al., 2000, p. 30).

It is essential that instructional leaders consider the core features of effective professional development and assess the extent to which the professional development that they are planning and implementing focuses on improving and deepening teachers' content knowledge and recognizes them as adult learners (Birman et al., 2000, p. 29). Reform efforts focused on new methods of teacher evaluation are driven by demonstrations of proficiency in instruction, subject matter, and practitioner effect on student learning; therefore, it is within these areas that instructional leaders need to focus their support (Youngs, 2013, p. 2). Generic professional development that focuses on technique without including content (Birman et al., 2000, p. 31) is not effective; the research implies that practitioners are more likely to engage in sustained professional improvement if they are able to identify purposeful connections between educator learning opportunities and improvements in instruction and student learning (Frampton et

al., 2002, p. 292). Additionally, planned professional development that contains active learning opportunities positively impacts the amount of knowledge and skills gained and changes practitioner habitude (Birman et al. 2000, p. 34). The coherence of instructional leader planning and implementation of professional development in relation to current policies and practitioner experience can directly result in positive teacher learning outcomes and improved classroom practice (Birman et al., 2000, p. 34). School context should be a key consideration, as it has implications regarding the success of staff development regardless of instructional leader practice (DeMonte, 2013, p. 9). Planned and implemented professional development should contain explicit, engaging purpose and measurable objectives defined by student outcomes to guide the type of continuing education opportunities that would best serve teachers and schools (Sparks, 1994, p. 6).

Staff Development Methods and Approaches

Selecting an appropriate professional development method and implementing the learning in a way that considers who the learners are is perhaps the most important step in creating continuing education for teachers. While there are many professional learning methods, goals and objectives must be considered prior to selecting a specific approach (Halim & Mozahar Ali, 1997). In general, professional development approaches can be organized into three broad categories including collaborative organization, practice oriented, job-embedded, and site-based approaches, and immersive, external methods (Abdal-Haqq, 1995; DeMonte, 2013; Dilworth & Imig, 1995; Elmore, 1997; Guskey & Yoon, 2009; Kirner & Lebrun-Griffin, n.d.; NCATE, 2001; Sherman & Kutner, 1998). Underlying each of the professional development approaches is the objective of establishing educators as reflective professionals with the capacity to monitor and

evaluate his or her practice (Sherman & Kutner, 1998, p. 2-3). It must also be considered that instructional leaders, in their efforts to create purposeful learning opportunities for teachers, must encourage practitioners to actively work together while managing time constraints and scheduling issues (*Education Week*, 2011). Finally, researchers and practitioners note that improved instruction is more likely to occur via planned education opportunities over time rather than the traditional method of single-event, "drive-by" development (DeMonte, 2013, p. 7).

Collaborative organization approaches include professional development schools (PDSs), which utilize the help of outside instructional leaders and college faculty to support teacher change through learning opportunities (Dilworth & Imig, 1995, p. 10). According to the National Council for Accreditation of Teacher Education (NCATE) standards for PDS, this collaboration uses inquiry to address teacher and student needs and relies on institutes of higher education to act as instructional leaders who determine educational opportunities for teachers (NCATE, 2001, p. 4). Another collaborative approach is the use of professional learning communities (PLCs) where collections of teachers come together, either with or without an instructional leader present, to set instructional goals, lesson plan, assess student data and mastery, and analyze teaching as a collective group (*Education Week*, 2011). A method that has gained popularity and encouraged a current trend, PLCs require organization of team members to work collaboratively; this process many times can stimulate practitioner growth, but it is not a guaranteed outcome (Inger, 1995, p. 32).

Practice-oriented, job-embedded, and site-based professional development is continuing education that directly connects to learning and practitioner application;

grounded in day-to-day practice, its goal is to encourage instructional growth based in content and strategy (DeMonte, 2013, p. 29). Authentically related to the work in which teachers are involved and based on the work that teachers do and areas of need (DeMonte, 2013, p. 30), many times this type of professional development is integrated into the workday and based on a cycle of learning that is usually initiated or lead by an instructional leader who identifies gaps in student and teacher performance and then tries to address them (DeMonte, 2013, p. 29). Some examples of job-embedded professional development include train-the-trainer models and the use of instructional coaches and facilitators who are available to model and provide critical feedback (Kirner & Lebrun-Griffin, n.d.). A caveat to site-based professional development is that its effectiveness and impact is dependent on quality planning, implementation, and expertise of the instructional leader who is managing the implementation of the continuing education; if the instructional leader is unprepared to plan and implement content with adult learners, results will not be positive and impact will be lacking (DeMonte, 2013, p. 8).

Finally, immersive external approaches consist of professional development instructional leaders working directly with teachers either individually or in groups, usually over a longer time period, at the school site or at an outside locale. Districts have developed two main types of consulting arrangements: a reliance on outside consultants who act as a contracted, focused expert who is utilized as an instructional support or a reliance on district consultants who are many times identified to do supplemental work or support teachers in specific ways, in certain instructional areas, and are compensated via a district budget (Elmore, 1997, p. 14). As technology expands and allows for increased access and lower professional development costs, telecommunications and distant

learning programs are also being used by both districts and schools in an attempt to improve student learning via instructional leader support (Guskey & Yoon, 2009, p. 496). Ranging from direct teaching and training methods of presentation to more collaborative mentoring and cohort programs, this style of professional development has been disparaged as ineffective in that its practice does not reflect the needs of teachers or their realities as learners (Guskey & Yoon, 2009, p. 496). While it may be true that a lot of workshops or instructional leaders and consultants are viewed by teachers as unhelpful and inadequate (Guskey & Yoon, 2009, p. 496), research has shown that the expertise and methods used determine the effectiveness of professional development and many times the impact of continuing education is only as deep as the knowledge of the practitioner leading it (Dilworth & Imig, 1995, p. 11).

Issues in the Field of Professional Development

Leading issues in the field of professional development are frequently focused on the ideas of professional development as a method for reform, professional development effectiveness as it relates to teacher evaluation, student learning, and best practices, and conceptual issues dealing with time, finances, and sustainability. While it is repeatedly stated that educational reform has its foundation in and is a direct result of support and development of teachers, policies and poorly planned and led professional experiences will never result in change (DeMonte, 2013, p. 1). Though the idea of reform through professional development is feasible, as the goal of practitioner education is to enact change and opportunity to learn new knowledge and translate that learning into demonstrated skill in the classroom (Elmore, 199, p. 2), current evaluation systems for professional development activities are lacking and do not address the terms of how

professional development planning, implementation, teaching approaches, and included

activities impact teacher change and in turn, impact student learning (Frampton et al.,

2002, p. 21). In fact, the lack of systematic evidence for useful approaches has left "little

direct evidence on the extent to which effective characteristics are related to better

teaching and increased student achievement" (Garet et al., 2001, p. 82).

Other issues include the reality that instructional change is a long, timely process

and impactful learning for teachers requires instructional expertise and long-term

planning (Dilworth & Imig, 1995, p. 11). Finally, staff development can be costly,

especially when opportunities for collaborative work are many times increased or

decreased by scheduling, instructional agendas, and a lack of proficient educational

leaders (Birman et al., 2000, p. 35). Current conditions encourage policy makers to view

continuing education for teachers as "a professional prerequisite rather than as a major

force for improving performance of teachers and students" (Elmore, p. 25); this makes

providing professional development activities with multiple high-quality elements a

challenge financially and with regard to lead time, planning, and resources. Many times,

a focus on the number of teachers reached supersedes depth of learning and quality of

experience (Birman et al., 2000, p. 35); it is an expense that is shortsighted when

reorganization of resources and funding combined with purposeful planning and

acknowledgement of adult learning realities can alleviate these relevant issues to those

participating in and planning for professional development (Desimone et al., 2002, p.

105).

Professional development must be "viewed as a tool for building individual and

institutional capacity for continuous improvement at the local level" (Frampton et al.,

2002, p. 21). Exposing teachers to new knowledge and skills to encourage behavior change is not enough; professional development must also result in increased practitioner proficiency and student comprehension of content (*Education Week*, 2011) and meet the needs of teachers operating in an ever-changing landscape. Effective professional development must extend educators' knowledge of content and pedagogy, as well as encourage active learning and a practitioner mindset of life-long improvement while considering structure, form, and core concepts (Birman et al., 2000, p. 35). There is a demand for continued teacher enrichment and refinement of skill and expertise; competent instructional leaders who are exceptional facilitators and experts with regard to students, teaching, and learning are necessary for educational reform (Youngs, 2013, p. 1). Though prevalent issues in the field make that a challenge, different approaches to professional development and the acknowledgement of andragogy can be used to ensure that "advances in understanding of subject matter, pedagogy, how students learn, and technology" (Youngs, 2013, p. 2) encourage practitioner growth and student achievement.

Adult Learning Theory

Instructional leaders supporting teacher change are critical for growth and achievement of both students and teachers, but change cannot occur without high-quality, well-designed professional development (Sharma & Bindal, 2013). Teachers bring to a professional development their previous experience, specific mindsets regarding the impact of what will be learned and different needs and wants (Patton et al., 2015). As a result, professional development must be learner-centered and recognize teachers' needs for knowledge-sharing that integrates theory and experience (Darling-Hammond &

McLaughlin, 1995). A clear understanding of human learning is essential for professional

development to have purposeful, significant impact on teacher practice (Jenkins, 2015).

When considering instructional leaders' planning and implementation of professional

development in relation to the varieties, realities, and intended outcomes of staff

development, learning theory must be applied—specifically Knowles's Adult Learning

Theory—and its six basic assumptions that act as a necessary element to meet teachers'

learning and professional development needs.

Knowles's Adult Learning Theory

The exploration of adults as learners is an ongoing mosaic of context, place, and

process of the learning itself (Merriam, 2001). Spanning from the 1920s with Thorndike's

focus on learning ability to the insights from the *Journal of Adult Education* in the 1940s,

adult education has been difficult to define (Knowles, 1978; Merriam, 2001). In fact,

much of the initial research on adult learning examined whether adults could learn at all,

and many times knowledge about adult learning was reliant on the research focused on

children or based on adults operating in child-dependent conditions (Merriam, 2001). Yet

as adult learners began to be distinguished from their child counterparts, the theory of

andragogy emerged, and was defined by Malcolm Knowles in 1968 as "the art and

science of helping adults learn" (Knowles, 1978; TEAL, 2011). This new theory

contrasted with pedagogy, the art and science of helping children learn (Knowles, 1980),

and from these assumptions and beliefs emerged a framework of understanding that acts

as a foundation of best practices for educating teachers and providing continuing

professional development that best fits the needs of adult participants (Ross-Gordon,

2003). With Darling-Hammond et al. (2017) defining impactful professional

development as "structured professional learning that results in changes in teacher practices and improvements in student learning outcomes" (p. v), it is essential to understand and recognize andragogy and the tenants of adult education as vehicles for impact on learning. As such, in order for professional development to be effective and purposeful for teachers as adult learners, specific elements of andragogy and adult learning must be present (Williams, 2005).

> In 1968, Knowles's definition of an adult learner included someone who:
> Has an independent self-concept and who can direct his or her own learning, has accumulated a reservoir of life experiences that is a rich resource for learning, has learning needs closely related to changing social roles, is problem centered and interested in the immediate application of knowledge, and is motivated to learn by internal rather than external factors. (p. 202-203).

Using this definition, Knowles defined a set of six assumptions that are in direct contrast with the assumptions of pedagogy, further illustrating the differences between adult and child learners and the need for those who educate adults to recognize that the adult learner simply learns differently (Knowles, 1990). Knowles's six assumptions of adult learners include: self-direction, enhanced experience, readiness to learn, problem-centered, internal motivation, and need to know (Blondy, 2007; Knowles, 1990; Merriam, 2001; TEAL, 2011). These pillars of learning can be applied to professional development and result in teacher change in that for continuing education of teachers to be effective, the teaching must reflect the learning realities of the learners themselves (Graham, 2017; Knowles, 1989; Masuda et al., 2013). Listed below are each of Knowles's assumptions as they apply to education practitioners and considerations of professional development.

Self-Direction

According to Knowles (1975), self-directed learning is a "process in which individuals take the initiative without the help of others" to plan, accomplish, and evaluate their own learning experiences (TEAL, 2011). Self-directed adult learners need to be actively involved in the decisions that affect them and experience a collaborative environment that encourages learner input (Blondy, 2007). Many times, teachers and their professional experiences with instructional leaders and learning opportunities are framed via a deficit model (Smith, 2017). As such, this model of professional development encourages an ongoing cycle of reliance on external expertise among teachers that results in learning opportunities that do not adequately address teacher needs, demands, and classroom realities (Smith, 2017). In addition, in Chapter 10 of her book, *Teachers as Self-Directed Learners: Active Positioning through Professional Learning*, Smith (2017) asserted that the data proposes that self-directed learning is a result of supportive learning experiences and learner consent to apply newly gained knowledge (p. 128). As initiatives change and standardized compliance becomes more prevalent, teachers are many times forced into roles that do not necessarily match their needs and desires as professionals and continual learners. Instead, the assumption of teachers as self-directed facilitators of knowledge is many times only permitted via daily lesson planning and implementation of curricula and content (Gregson & Sturko, 2007). Yet, teachers enter professional development contexts and practitioner learning environments as self-directed adult learners who want to be seen. When that reality is ignored, it may result in passive disconnection that will never translate to active practitioner change (Smith, 2017, p. 129).

Enhanced Experience

Teachers are agents for change with regard to student achievement, but recognition of their life experiences can impact their disposition towards learning opportunities and change in their own practice (Altan & Lane, 2018). The role of a learner's experience with regard to adult learning context is important because "as individuals grow, they accumulate a reservoir of experience that becomes an increasingly rich resource for learning" (Woodard, 2007). A variety of gained knowledge through life experiences provides adult learners with different meaningful insights from which to draw from and backgrounds that contribute to their new learning (Gregson & Sturko, 2007). Many times, teachers' experiences are not valued in interactions with instructional leaders and within professional development contexts causing feelings of rejection and minimization of practitioner competency (Terehoff, 2002). As such, professional development has to offer practitioners moments to explore ideas and consistently collaborate within the context in which they work and exercise their professional skills (Gregson & Sturko, 2007, p. 4). In order for adult learners to make sense of the unknown, links to the known are important and newly gained knowledge is more impactful when it is assimilated and interwoven with what is already mastered, experienced, or part of current practice (Terehoff, 2002, p. 68). Teachers learn from both their successes and failures and use that experience to shape their future instructional moves and decisions (Pinsky & Irby, 1998). Adult learners want to "actively recall experiences from their classrooms and [be offered] opportunities to form analogies between new learning and familiar life experiences" (Simmons & Borden, 2015). In order for professional development to effectively serve educational practitioners, space must be given to

acknowledge foundational experiences as professionals and adults (Simmons & Borden, 2015).

Readiness to Learn

Readiness, as defined in andragogy, is the idea that "learners see education as a process for developing increased competence to achieve their full potential in life" (Woodard, 2007, p. 45). The adult scholar wants learning objectives based on their personal needs, interests, and skills (TEAL, 2011) and are most ready to learn when necessity, changing roles, or social context and situations create a need to learn something new (Blondy, 2007). Knowles (1980) noted that learners' needs and attributes based in society or institutions must be recognized and integrated for adult learner readiness (Blondy, 2007, p. 123). This statement parallels instructional leaders' reality of balancing district, school, and community goals and realities with educational initiatives and best practices for educators. Adult learning must be oriented to changing contexts that require new knowledge (Graham, 2017); targeted focus and alignment of professional development with teacher needs, interests, or desires helps to support purposeful learning opportunities that will translate to teacher motivation and change in practice. When learning is grounded in practical, applicable topics in which teachers can "see" themselves, their readiness and appreciation of the education climate will increase (Beavers, 2009). Timing is also an important factor with regard to readiness and the adult learner, as a beginning teacher's learning needs will vary greatly from a veteran teacher's concerns for practice (Gregson & Sturko, 2007). According to Merriam and Bierema (2014), readiness to learn intersects with "teachable moments" that arise from changes in social roles that create an immediate need or a desire to prepare for future engagements

(p. 52). As careers progress and formal learning is extended for future positions, teachers' social roles change, resulting in varying learning needs; practitioner continuing education must address these demands properly to support growth in practice (Masuda et al., 2013; Merriam & Bierema, 2014).

Problem-Centered

Adult learners want educational experiences that are grounded in problem-solving and opportunities to immediately apply the knowledge that has been gained (Merriam & Bierema, 2014). Motivation in an adult scholar emerges when learning perceptions illustrate an immediate application to life or work realities (Gregson & Sturko, 2007; Knowles et al., 2005). As such, teachers want practitioner-friendly, substantial professional learning opportunities that relate to their practice and allow for instant implementation in their classroom (Gregson & Sturko, 2007). According to Graham (2017), "adults encounter problems, learn how to solve those problems, and then immediately apply their knowledge to those problems." Teachers want to be offered learning experiences that present pragmatic knowledge that supports problem-solving and more effective practice (O'Neill, 2020); as such, recognizing a use for shared knowledge and learning opportunities encourages teachers to utilize and implement what was taught in a timelier manner (Petrie & McGee, 2012).

Internal Motivation

Intrinsic motivation guides adult learning (Gregson & Sturko, 2007). Increased job satisfaction and self-esteem, as well as improved quality of life and personal fulfillment, motivate adult learners to seek out educational opportunities that fulfill their internal needs and support their self-actualization (Merriam & Bierema, 2014).

Professional development is "a period of ongoing intellectual and cognitive growth for teachers" (Terehoff, 2002, p. 70) and must recognize that the structure, process, and motivation of learners will vary based on their needs and interests. Creating a conducive environment in which teachers excel to high levels of learning can only be achieved when internal rewards are present (Woodard, 2007). While external factors like job promotion, salary increases, or professional incentives do have an effect on willingness and desire to learn, intrinsic factors are more important to adult pupils and have greater impact on learner motivation (Gregson & Sturko, 2007). In order for the teaching practitioner to be fully engaged, the learning experience must be grounded in the learners' ambition to engage in learning opportunities and recognize individual needs (Simmons & Borden, 2015). Without this reality, teachers won't "grow in self-development" and learning will feel forced rather than pursued as an opportunity for improvement (Graham, 2017).

Need to Know

Adult learners must understand the necessity of their learning prior to experiencing the learning itself (Knowles et al., 2005); presenting the value behind the learning will aid adult motivation and receptiveness regarding opportunities to experience new knowledge (Ota et al., 2006). While collaboration to identify learner needs is important (Blondy, 2007), it is also essential that learning objectives and their corresponding explanations regarding reasoning be acknowledged (Woodard, 2007). To avoid deficit teaching and also encourage agency over learning, teachers must see the need and implications of the knowledge they are expected to master (McGrath, 2009). When perception of value is present, teacher-learners demonstrate more positive attitudes and willingness to participate in learning opportunities (Masuda et al., 2013). Adult

learners invest in learning that is perceived to be necessary (Masuda et al., 2013); teacher practice will only be affected by learning that is perceived to be purposeful and practical (Ota et al., 2006). If professional development encourages teachers to see "why it is important to learn something before they begin a learning activity," teacher motivation and attainment of desired objective will be positively impacted (Merriam & Bierema, 2014, p. 55).

Impact of Adult Learning Theory

Adult learning and adult learning theory recognize that creating quality learning experiences for adults requires recognition of the differences between andragogical and pedagogical practices (Merriam & Bierema, 2014). In order for professional development to truly impact teachers, the assumptions of Malcolm Knowles's Adult Learning Theory must be present in the learning opportunities that are being created by instructional leaders to promote practitioner growth. For this study, the decisions and implementation of professional development as determined by instructional leaders were explored with regard to the principles of andragogy that drive adult learning and impact learner comprehension and instructional change. With foundational implications for teacher practice and pedagogy, instructional leaders' incorporation of the pillars of adult learning theory must be considered as a support for practitioner growth (Merriam, 2001).

Summary

The purpose of this study was to explore professional development from the perspective of instructional leaders to identify if the assumptions of Knowles's (1990) Adult Learning Theory were present in the planning and implementation of educator learning opportunities. This research aimed to investigate the ideas and animate

coaching of instructional leaders, presented an analysis of this through adult learning theory, and also explored the ways instructional leaders do and do not consider adult learning realities in their practice. The literature summarized in this chapter offers a review of the research to date related to professional development practice, planning, implementation, and its connection to adult learning theory. The chapter presented the history and best practices of professional development and explored the roles of instructional leaders with regard to practitioner education. In addition, the theories of andragogical practice were presented and discussed in relation to professional development planning and implementation, including a description of Knowles's Adult Learning Theory; the impact that andragogical assumptions have on adult learning and teacher professional development was reviewed.

The literature suggests that the quality of educators is imperative to the achievement of students and effectiveness of teachers (OECD, 2015). Effective professional development that recognizes adult learning theory leads to increased quality of instruction and positive student outcomes (Sharma & Bindal, 2013; Timperley & Alton-Lee, 2008). Studying the process, planning, and implementation of professional development led by instructional leaders is important and will add to the literature by providing information about the support teachers receive via professional development and adult learning opportunities. In addition, this necessary research provided insight into how the planning and implementation of staff development, combined with adult learning theory, may support practitioner change and increased educational outcomes for both teachers and students.

CHAPTER 3: METHODOLOGY

Within the education profession, the past two decades have been defined by national and state reform efforts focused on increased student achievement for all students and accountability measures to encourage growth (Burke et al., 2012). While the trajectory and purpose of teacher professional development has been varied, schools are making significant investments in training their teachers (Patton et al., 2015; Sharma & Bindal, 2013). Despite this push for educator development, both state and individual district measures to increase school quality, close achievement gaps, and increase student achievement seem to be falling short (Lam et al., 2016). While the research implies effective professional development for teachers leads to increased quality of instruction and positive student outcomes (Sharma & Bindal, 2013; Timperley & Alton-Lee, 2008), current evaluation systems for professional development activities are lacking and do not address the terms of how continuing education activities "affect teaching competence and how these changes in teaching in turn affect student learning" (Frampton et al., 2002, p. 21). In fact, the lack of systematic evidence for effective approaches has left "little direct evidence on the extent to which effective characteristics are related to better teaching and increased student achievement" (Garet et al., 2001, p. 82).

An important aspect of professional development is to "specify strengths and weaknesses in instruction and help teachers improve their professional practice" (DeMonte, 2013, p. 11); therefore, professional development must be "viewed as a tool for building individual and institutional capacity for continuous improvement at the local level" (Frampton et al., 2002, p. 21). Furthermore, it is essential to understand and recognize andragogy and the tenants of adult education as vehicles for impact on learning

(Darling-Hammond et al., 2017). As such, in order for professional development to be effective and purposeful for teachers as adult learners, specific elements of andragogy and adult learning must be present (Williams, 2005).

In an effort to understand professional learning outcomes with regard to the development practices that result in teacher change, this qualitative case study sought to apply Knowles's six assumptions of adult learning theory and examine instructional leader perspectives of professional development planning and implementation. In this chapter, a description of the research design, setting, participants, methodology, data collection and analysis, and limitations of the study is discussed. The purpose of this study was to examine the ideas and theories that three instructional leaders responsible for teacher continuing education use to plan and implement professional development and to discuss in what ways these ideas, theories, and practices align with current theories of adult learning. A qualitative case study approach was utilized to answer the following research questions:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

Research Design

A qualitative case study research design was utilized to examine the decisions for and implementation of professional development created by instructional leaders with

consideration of the principles of andragogy that drive adult learning. A case study design based on interviews and observations was employed to gain insight into the decisions and implementation of professional development created by instructional leaders with regard to the principles of andragogy that drive adult learning. The case study methodology is useful when exploring new processes or behaviors and is well suited for addressing how and why questions about a "contemporary set of events" (Meyer, 2001, p. 230). In addition, qualitative design allows for examination of conditions that "facilitate or inhibit shifts in educational practice and knowledge" (Gay et al., 2009, p. 430) within a school's culture. Evaluative feedback for educators and methods for addressing impactful practitioner reform is an on-going challenge (Yin & Davies, 2007); as such, a case study on professional development and adult learning is necessary. Utilizing a qualitative approach allows for the study to be particularistic in nature, in that the focus is placed on "a particular situation, program, event phenomenon, or person" (Duke & Mallette, 2011, p. 8). In addition, utilizing multiple data sources via a case study approach including observations and interviews allows for differentiated results that can be studied for purpose (Duke & Mallette, 2011, p. 22).

Qualitative research is an interpretive approach to study phenomena in its natural environment; its intent is to reveal meaning, understanding, and perceptions that are outside of the researcher's world and from these experiences, allow a narrative to emerge. (Harreveld et al., 2016; Jones, 1995). Qualitative researchers focus on gaining insight into the human experience (Merriam & Tisdale, 2015); the goal of qualitative research is to utilize participants' perspectives to understand human subjects, the meanings they create, and how they make sense of their own context and experiences (Merriam, 1998;

Merriam & Tisdale, 2015, p. 6). A qualitative approach encourages depth of understanding based upon participant response and allows for deeper insight and understanding into social phenomena (Mertens, 2005). Based on personal fieldwork that is many times conducted by the researcher in the participants' natural environment, qualitative research provides perspective and detailed descriptions that capture rich data (Creswell, 2007; Merriam, 1998). Furthermore, by building a narrative, participants' experiences and meaning-making of those experiences offers a research perspective that could otherwise be lost (Trahar, 2009). For this qualitative study, a case study design was implemented to better understand the ideas, theories, and adult learning assumptions that instructional leaders use to inform planning and implementation of professional development.

Case Study Design

Case study inquiry is a natural progression in examination of a topic, as it encourages motivation towards further study on a larger scale and allows for progression and movement from studies that are qualitative in nature to more structured and quantitative investigations (Sofaer, 1999). Flyvbjerg (2006) argued that case study research is necessary "for the development of a nuanced view of reality" that can only be gained via inquiry of personal experience and context-dependent situations. In addition, case study can be a method for avoiding blind spots in the research that may never come to light without the closeness of real-life situations and individual cases (Flyvbjerg, 2006). As such, a case study was an appropriate choice of study design based on the research questions and study exploration into a social phenomenon based in context and situation (Mertens, 2015; Yin, 2009).

In order to resolve that the findings are relevant to the context, multiple sources of evidence must be collected from bounded context within case study research (Taylor & Thomas-Gregory, 2015; Yin 2009). Taylor and Martindale (2014) asserted the characteristics of case study research are important and must be visible in the research. These characteristics include: the study context is essential for comprehensive examination, a holistic approach of understanding must be applied to the situation or phenomenon, a quality research design must be present, and the research culminates in a narrative that "tells the story of the case so that readers of the research can determine its relevance to their practice" (Taylor & Martindale, 2014; Taylor & Thomas-Gregory, 2015). Case study can be defined in three different ways: intrinsic, instrumental and collective (Crowe et al., 2011). Intrinsic case study focuses on learning about a unique phenomenon, while instrumental case study utilizes a specific case as an entry for more comprehensive awareness of an issue or phenomenon. Additionally, collective case study incorporates multiple cases "simultaneously or sequentially" in an effort to develop an expanded understanding of a particular topic (Crowe et al., 2011).

The purpose of this study was a collective or multiple case study that included participation from several instructional leaders who shared their ideas and theories regarding the planning and implementation of practitioner professional development. The individual instructional leaders were the primary unit of analysis, and data about these individuals was collected to build the "cases" for which the research questions were applied (Yin, 2009). The study questions focused on instructional leader perceptions and their relationship to adult learning theory assumptions. According to Yin (2009), analytic benefits increase with the inclusion of more than one case (pp. 60-61). Participants'

perceptions were based on their own experiences and knowledge and shared using both within-case and cross-case design. In this multiple case study, participants' data worked as companions to one another and when analyzed both independently and together, gaps were filled, and the data demonstrated a collective picture of experience. As a result, the multiple cases comprised a stronger case study that makes the findings more compelling (Yin, 2009, p. 62). This data analysis design allowed for individual components within-case to be investigated first, which then encouraged comparisons across cases (Crowe et al., 2011). The first two questions were answered and analyzed using within-case analysis and examined for emerging themes:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

Individual cases were investigated both during and after data collection with specific focus on: (a) the utilization and impact of instructional leaders' ideas and theories, and (b) themes within each case. A cross-case design was implemented with the third research question:

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

A thematic analysis was applied to the data to identify themes that were present both within and across cases; these themes were then investigated to reveal larger themes for

study implications and examined in relation to adult learning assumptions. Additional data analysis is presented in more detail in Chapter 4.

Research Context

Research Setting

Due to the nature of the participants' roles as instructional leaders and independent educational consultants, the research setting was dependent on the participants themselves and the locations in which they were contracted to conduct continuing education sessions with teachers. In addition, with the circumstances surrounding COVID-19, remote learning, and school closings, all the participants completed their professional development virtually. Despite this, the instructional leaders were committed to plan and present professional development remotely at three different suburban schools surrounding a city in the Southeastern United States. The selection of the schools was based on convenience in that the instructional leaders planned and conducted observable professional development for these locations at the start of the 2020-2021 school year. All the participating school locations served middle school students in grades six through eight. The schools represented a variety of educational settings ranging from one school that opened in 2011 and recently applied as an International Baccalaureate candidate to another setting that was established in 1914 and is a traditional community school. All selected schools had similar demographics and data in that there were teaching and learning gaps based on income and race/ethnicity. The schools were included in the study due to their implementation of additional instructional support in an effort to impact student achievement, teacher effectiveness, and academic performance. This instructional support included identifying instructional

leaders who were tasked with planning and implementing professional development for the teaching staff.

Research Participants

The participants in the study were instructional leaders and educational consultants who work across school districts with multiple elementary, middle, and high school sites in suburban and urban districts. There were three instructional leaders who participated in the study; consideration for inclusion was based on experience level and current role as an instructional leader and educational consultant. For the purpose of this study, an instructional leader participant was responsible for "building [the] capacity of teachers to help students learn" (DiPaola & Hoy, 2014). In addition, the designation of participants as instructional leaders was based on the National Association of Elementary School Principals' (2008) definition of instructional leadership as outlined in Chapter 2. All participants had a minimum of 10 years of teaching and educator experience. Pseudonyms were created to reference all participants, their consulting businesses, and school locations in an effort to protect the privacy of those involved in the study. Identifying information was only known by the researcher for the purpose of the study, and confidentiality of the participants was ensured in that the data that was collected via interviews, professional development notes/materials, and observations of continuing education sessions was not shared by the researcher with anyone else. Furthermore, the instructional leaders were selected based on convenience sampling and established relationships; participants were selected for the study due to practical criteria, including geographical proximity, availability, accessibility, and their willingness to be part of the study (Farrokhi, & Mahmoudi-Hamidabad, 2012). Criteria for the study included that the

participants work as instructional leaders with teaching staff, commission as independent educational contractors, and have more than 10 years of combined teaching and educational leadership experience.

Any reference to participant or company names are pseudonyms. The first participant, Miss M, works full time as an instructional coach in a large district. Her experience in education includes 23 years in positions including an academic facilitator and a university instructional coach for beginning teachers. Participant two, Ms. I, taught 19 years in the classroom and now works full time as the owner of an instructional coaching and professional development business that provides K-12 schools and teachers with support on classroom management, student engagement, feedback, and personalized professional development. She has teaching experience in elementary, middle, and high school as an English-Language Arts teacher, Multi-Tier Systems of Support (MTSS) coach, lead teacher, media coordinator, and AIG Coordinator. She has also worked as a band director and instructional coach. Finally, Mr. O has over 18 years of experience in the education profession serving in a variety of roles including English-Language Arts teacher, instructional specialist for secondary schools, and as a university instructional coach. He is employed full-time as an independent instructional coach for large districts.

Data Collection Methods and Procedures

For this study, data collection utilized triangulation and consisted of multiple sources including interviews, observation, and document analysis with the intent of increasing the validity of the findings. Both interviews and observations took place virtually due to COVID-19 and aimed to answer Question 1, "What ideas and theories do instructional leaders say they use to plan and implement professional development for the

teachers with whom they work?" and Question 3, "In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?" Both the interviews and document analysis were utilized with specific regard to Question 2, "How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?" Prior to collection of data, each participant was asked to sign a letter of informed consent (see Appendix A). Notes were kept on the observation of professional development sessions, and all interviews were recorded and transcribed. A timeline of data collection is represented in Table 1. During data collection points (observations and document analysis), the researcher used an Observation Form (see Appendix D) to record thoughts, field notes, questions, ideas, and observations. The Observation Form acted as a memo, recording the researcher's thoughts regarding the data and aiding analysis and the development of emerging themes.

Table 1

Timeline of Data Collection

Initial Interview with Instructional Leaders	August 2020
Review of Notes and Professional Development Documents	August 2020
Observation of Instructional Leaders' Professional Development Session (One per participant)	September - October 2020
Post-Interviews with Instructional Leaders	October 2020

Interviews

The three participants were interviewed twice, and each interview lasted approximately 45-60 minutes. All interviews were semi-structured but followed an interview protocol and were conducted via a scheduled, virtual video meeting with the

researcher. This allowed for more flexibility regarding the interview and questions but also permitted for some structure in questioning to address the specific information that is targeted for respondents' responses (Merriam & Tisdale, 2015, p. 110). The initial interview with participants aimed to identify how instructional leaders plan and implement professional development within their current roles as educational consultants and allowed the researcher to better understand the participants' perceptions and experiences. The interview questions were focused on participants' ideas and theories regarding the planning and implementation of professional development for teachers and allowed open-ended responses. Probing questions were planned and implemented to explore participants' answers that needed additional clarity or depth of response. Listed below is an example of a probing question based on an inquiry question regarding the planning of professional development.

Table 2

Example of Probing Questions

Question	What process do you use to determine the goals of professional development sessions?
Probing Question	Please explain what role, if any, participants serve when planning professional development?

All interviews were recorded and transcribed for accuracy and followed an interview protocol (see Appendices B and C).

Observations

Observations were conducted to watch the participants implement planned professional development sessions with teachers and capture them presenting the work they planned. The observations were conducted as a method of insight into practitioner

professional development implementation; specifically, the sessions were observed to see if the instructional leaders were aligning the activities and language they presented with the assumptions and theories of adult learning. Since this study sought to focus on the participants' beliefs and instructional moves, the researcher did not observe or collect any data on the teacher attendees, their responses or engagement, or any other information outside of the instructional leaders' planning and implementation of PD. This method of observation was purposefully planned not only to control for researcher bias but also to limit the use of an evaluative lens. As such, the researcher solely observed the instructional leader-participants during the virtual presentations; for example, the researcher only entered virtual breakout rooms if the participant chose to and only watched the participant on the screen rather than viewing the attendees as well.

In addition, the observations allowed the researcher to view how the participants' implement and present their ideas, theories, and practices regarding professional development to teachers during live sessions. During the observations, field notes describing the setting, participants, activities and overall event were captured in memos containing reflective interpretive thoughts and organized on the Observation Form (Appendix D). In addition, quotes, thoughts, and reflections were added during the observation of the professional development session.

Document Analysis

All participants were asked to share with the researcher any materials from the professional development, including any created professional development materials and presentation and related documents regarding the planning and implementation of the professional development session, notes, and reflections. Participants agreed to share

these items when they gave consent to be part of the study. The documents were

submitted and considered prior to the observation of the participants conducting a

professional development session. During the post-observation interviews, participants

were permitted to reference the materials, and all documents were collected and analyzed

a second time in order to see if there were additional themes that emerged as a result of

the interview; the documents also were used as confirmation of the interview insights.

While the documents acted as "non-reactive" data sources that were read and reviewed

multiple times (Bowen, 2009), the interviews provided additional information and an

element of social interaction (McLeod, 2014).

Data Analysis

Following data collection, qualitative data analysis occurred including a thematic

analysis and progressive coding of all interviews after transcription with the intent to

develop analytic generalization (Saldana, 2016, p. 68; Yin, 2009, p. 39). A deductive

approach with two cycles of coding was utilized to identify codes and present patterns

(Saldana, 2016, p. 75). Cycle one included descriptive coding, a method best used to

address the epistemological nature of the research questions due to its inquiry of knowing

and focus on understanding the studied phenomenon (Saldana, 2016, p. 70). Cycle two

followed and provided pattern coding, which not only provided a method of cataloging,

but also aided deeper exploration of the epistemologies (Saldana, 2016, p. 70-71).

Applied sequentially, the codes allowed for a thematic analysis that provided deeper

insights into the data (Saldana, 2016, p. 73). There are six stages that must take place

when implementing a thematic analysis: (1) familiarization, (2) coding, (3) generating

themes, (4) reviewing themes, (5) defining and naming themes, and (6) writing up

findings (Caulfield, 2019); the initial coding cycle allows for preliminary coding of the data. The deductive process of two cycles with descriptive and pattern coding is appropriate for the study in that these types of coding process are specific for "field notes, documents, and artifacts as a detailed inventory of their contents," and allow for categorization as an analytic strategy (Saldana, 2016, p. 74).

Initial coding within each case took place using open codes that addressed the open-ended nature of the research questions, these were then categorized based on similar characteristics to identify patterns within each case (Chun Tie et al., 2019). In cycle two, open codes were used again across the cases, and then grouped together, to identify patterns from which themes emerged that demonstrated and addressed variations and relationships both within and across cases (Crowe et al., 2011). The final stage then compared and contrasted identified themes both within and across cases, and extracted patterns and themes from the data were examined in relation to the assumptions of adult learning theory. By analyzing the data and identifying a core category, a pattern of behavior in instructional leader planning and implementation of professional development was identified and studied to determine its relationship to the assumptions of adult learning theory. Through this pattern, general implications regarding professional development and adult learning emerged to provide insight into how instructional leaders prepared and presented staff development and how it recognized the adult learners for which it was created (Merriam & Tisdale, 2015).

Two rounds of coding were used to generate codes and themes for the first two questions, and a cross-case comparison emerged using the constant comparative method to ensure insights that were produced were grounded in the data (Noble & Mitchell

2016). Interviews were transcribed and coded across the caseload using NVivo software.
A codebook was created and printed for sorting, resulting in categories. The identified
coding strips were arranged and grouped, and a list of generated groupings were kept via
memos noted during interviews and the transcription process (Crowe et al., 2011). Next,
observations of professional development were conducted and memos used; the same
process occurred, with a constant comparative method being utilized to reflect previous
coding. Following the observation, a document analysis of related professional
development materials was completed. O'Leary (2014) described two major techniques
for document analysis including the interview technique and noting occurrences, or
content analysis. For this study the initial technique was used, with the researcher treating
the documents "like a respondent or informant that provides the researcher with relevant
information" (O'Leary, 2014).

The thematic analysis and appropriate coding methods allowed for systematic
identification of patterns and themes both within and across a data set; emerging codes
and themes were cross-compared with findings from the interviews and observations for
theoretical coding integration. The final interview and corresponding questions were
based on the findings of analysis and took place to complete the data. As data was
collected and analyzed both within and across cases, codes were identified, grouped,
merged, and compiled into a master list of concepts that then built a classification system
to demonstrate recurring patterns among the data (Merriam & Tisdale, 2015). As open
codes began to form clusters, one set of coded data led to insights that were then applied
to the next set of data and this cumulative process led to themes that emerged from the
data evidence. The forming of categories and themes was highly inductive, but the

process became deductive as the researcher moved through the data with specific

identified coding processes that will led to information, understandings, and realizations

saturation (Merriam & Tisdale, 2015). Through this process, several themes emerged

including Participant Knowledge, Connections, and Teachable Moments. Though these

will be explored further in upcoming chapters, as a collective, the themes helped to define

an apprenticeship model of coaching via professional development that was present in the

beliefs and practices of all the participants.

Table 3

Connections Between Questions, Data Collection, and Analysis Procedures

Research Question	*Types of Collected Data*	*Data Analysis Procedure*
1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?	• Instructional Leader Pre-Interview • Instructional Leader Post-Interview • Documents	• Within case coding of transcripts • Across case coding of transcripts • Document analysis
2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?	• Instructional Leader Pre-Interview • Instructional Leader • Documents • Observation of professional development	• Within-case coding of transcripts • Across-case coding of transcripts • Document analysis • Observation analysis
3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?	• Instructional Leader Pre-Interview • Instructional Leader	• Within case coding of transcripts

	• Observation of professional development	• Across case coding of transcripts • Observation analysis

Trustworthiness

Several elements were implemented to ensure trustworthiness during the study.

Member checks, or respondent validation, were used to solicit feedback from participants

to mitigate possible misinterpretations of the participants' meanings, intentions, and

perspectives. In addition, the member checks acted as a way to manage and identify

researcher bias and misunderstanding during analysis of the data (Merriam & Tisdale,

2015, p. 246). Participants had an opportunity to audit their case, offer feedback and

confirm or correct conclusions made by the researcher. In addition, Chapter 2 contains a

subjectivity statement that presents the researcher's position to the topic and allows for

transparency for potential research bias. Finally, sufficient, descriptive data were

included to ensure generalizability, credibility, and consistency (Merriam & Tisdale,

2015). Rich, thick description and detailed participant quotes were referenced to ensure

transferability. For example, quotes from instructional leader interviews and observed

professional development sessions demonstrated situational realities and staff

development dynamics to draw parallels between the study and other contexts (Merriam

& Tisdale, 2015).

Ethical Issues

There were no foreseeable risks involved with this study, and the study followed

the guidelines for human research as set forth by the Institutional Review Board

(IRB). All participants signed consent forms (Appendix A) and were free to end their

involvement in the study at any time. Ethical and political considerations were minimal in that all participants were provided with all interview transcripts for review. In addition, observations were focused on implementation of professional development content rather than participant performance, and all stakeholders were assigned pseudonyms to help protect the anonymity of the participants. Data collected during this study was kept confidential via a password-protected Google Drive folder. No participants were identified in the interview recordings and only the researcher had access to these recordings. All interview audio was destroyed upon transcription, and all hard-copy consent forms, transcription, and observation notes were scanned and saved as digital versions in a private Google Drive.

Limitations

There are several recognized limitations to the study. Due to its limited size and convenience sample, the findings and interpretations must be cautiously considered. As the study was qualitative in nature and a goal was to get an in-depth description of instructional leader beliefs and inclusion of adult learning theory for planning and implementing professional development, this was a realistic limitation. However, this limitation must be recognized, as the experiences of the participants is not necessarily representative of others. Additionally, the participants were involved in professional development creation and implementation for teachers but also have additional responsibilities and positions that may affect their perceptions and beliefs regarding continuing education.

Another limitation of the study is the researcher's own bias. The researcher is an instructional coach who delivers substantial amounts of professional development and

coaches teachers; she would be considered an instructional leader based on the study definition and as explored in the Subjectivity Statement in Chapter 1. As such, the researcher may have had bias due to her strong beliefs that educators need to be seen as professionals and quality continuing education opportunities must be offered to help support and enhance teacher practice and effectiveness. In an effort to control bias during data collection and analysis, memos were kept to capture reflections and separate researcher opinion from conclusions that were grounded in the data. Semi-structured interviews were utilized to ensure the discussion was focused on the study questions, and protocols were used to minimize bias and personal beliefs as a way to avoid improper influence on analysis. The researcher's relationship to the study was present in that she is employed as an instructional leader who plans and implements professional development, but the study intent emerged from her desire to learn from other instructional leaders and gain insight regarding the reasoning behind the planning and implementation of professional development as an adult learning experience. The researcher did not focus on or include personal opinions of effectiveness or quality of work when considering the planning and implementation process and adult learning assumptions, and memos were used when conducting observations or reviewing related study documents. As a strategy to keep the focus on the collected data, the researcher recorded any thoughts unrelated to the study purpose via personal notes that do not relate to the research questions and were not to be included in the study.

Despite these limitations, as teacher accountability, high-stakes testing, and performance pressure on educators increases and the educational landscape continues to change and expand due to new initiatives and student generational development,

instructional leaders and the professional development they create must meet the needs of a more diverse student and teacher population. This research sought to inform teacher professional development and the inclusion of adult learning theory assumptions in the continuing education opportunities with which teachers are presented.

Summary

The purpose of this study was to examine the ideas and theories that three instructional leaders responsible for teacher continuing education used to plan and implement professional development. This qualitative case study sought to apply Knowles's six assumptions of adult learning theory and examine instructional leader perspectives of professional development planning and implementation. A qualitative coding process using the constant comparative method was applied to collected data including interviews, observations, and a document analysis to answer the following research questions:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

In this chapter, a description of the participants, three instructional leaders, was presented, and information regarding the case study methodology was discussed. Data collection, including interviews, observations, and document analysis were discussed in relation to the research questions. In addition to presenting the research design and

methodology, the chapter reviewed the data collection process, analysis procedures, and

limitations of the study.

CHAPTER 4: ANALYSIS

The purpose of this study was to explore professional development from the perspective of instructional leaders to identify if the assumptions of Knowles's (1990) Adult Learning Theory are present in the planning and implementation of continuing education. This research sought to study the ideas and theories of instructional leaders, present an analysis of this through adult learning theory, and also explore the ways instructional leaders do and do not consider adult learning realities in their practice. The study participants included three instructional leaders with more than 10 years of experience each teaching, leading, and coaching educators and students in traditional K-12 environments. Participants were observed implementing a professional development session and interviewed before and after these observations; additionally, documents from each professional development session were collected and analyzed to answer the following research questions:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

In Chapter 1 the problem, purpose, significance, and theoretical framework of this study were described. Chapter 2 presented a literature review that summarized the

history and best practices of professional development, explored the roles of instructional leaders with regard to practitioner education, reviewed the theories of andragogical practice, including a description of Knowles's Adult Learning Theory. Chapter 2 also examined the impact that andragogical assumptions have on adult learning and teacher professional development. Chapter 3 reviewed the methodology and research design implemented to gain insight into the decisions and implementation of professional development created by instructional leaders with regard to the principles of andragogy that drive adult learning. Data analysis, trustworthiness, anticipated ethical issues, and study limitations were also explored. In Chapter 4, the ideas and theories of instructional leaders will be presented. This chapter provides a within-case analysis for each of the cases that explores the first two research questions, followed by a cross-case analysis that examines connections between the cases and addresses the final question of the study. The chapter closes by exploring the themes that developed from the analysis.

Within-Case Analysis

The remainder of the chapter is organized around the areas of Instructional Leader Beliefs, Planning, Implementation, and Analysis. Using descriptive narrative and direct references from participant interviews, observations, and submitted documents, emerging themes from both the within-case analysis and across-case analysis are explored. In addition, each participant's ideas, theories, planning, and implementation of professional development is investigated parallel to the six assumptions of adult learning. Finally, an across-case analysis revealed the main

themes of the data, including a) Participant Knowledge, b) Connections, and c) Teachable Moments.

Planning and implementing effective professional development that recognizes adult learning theory and leads to increased quality of instruction and positive student outcomes (Sharma & Bindal, 2013; Timperley & Alton-Lee, 2008) is a target for districts nationwide, especially in the current teaching climate. Many times, this task becomes the responsibility of instructional leaders who apply their own ideas and theories of planning and implementing professional development to teacher learning opportunities and who may or may not consider the andragogical needs of their adult participants. In the three cases studied it became evident that instructional leader beliefs and ideas regarding their role in teacher education and support, as well as their experiences working with teachers, impacted their planning and implementation of professional development sessions for adult learners. An instructional leader's definition of professional development, their perceptions of what practitioners need, the lens of the presenter, and their understanding of teachers as adult learners, shaped the planning and delivery of their continuing education sessions.

To preserve anonymity, specifics about the participants' current employment and details about the schools and teachers with which they work were protected. Additionally, pseudonyms are used to protect individual identities since the study consisted of only three case studies and the identity of the individual participants could be compromised if more detail was provided. Due to their work as educational consultants and independent contractors, participants had to feel comfortable disclosing their ideas, beliefs, and planning process for professional development

without feeling it would impact their work or possibly be used to evaluate their professional competence.

All participants were interviewed twice and provided the researcher an opportunity to observe them conducting a professional development for a school/district. At the time of the study, a pandemic developed, and COVID-19 impacted education immensely. Therefore, all data collection and professional development observations were conducted remotely via the Zoom remote conferencing platform. While the interviews were recorded and transcribed, due to the nature of the study, the observations were attended by the researcher as a participant observing the instructional leader only. No consideration of the professional development attendees was given, and all attendee responses were ignored. The focus of the research was solely on the instructional leader beliefs, planning, and implementation of PD; therefore, the researcher purposefully focused on the instructional leader participants only and completely disregarded the attendees and any responses or interactions that may have occurred among the audience during the observation. To capture the data during observations, the researcher utilized an observation tool (see Appendix D).

Finally, each participant shared documents related to the professional development including presentation slide decks and hyperdocs that were considered in the study analysis. The hyperdoc, a digital document—most often organized as a Google Doc—was used by all the instructional leaders as part of their PD materials. This resource was shared with participants during or after the professional development and it contained all key information and resources from the learning

session. Using this individual document, the instructional leaders provided their

participants with hyperlinks and information to be referenced and explored both

during and after the professional development workshop.

Miss M

*"My main goal is to be more of a facilitator than a lecturer, but also to empower
teachers so that they become teacher leaders, and they can facilitate and share their
learning."*

Instructional Leader Beliefs

When asked to define what she thinks an instructional leader is, Miss M, an

instructional leader with 11 years of experience said:

> A true instructional leader is one that kind of goes in and sets the tone, has the
>
> criteria that you're looking for, provides the resources needed to make sure that
>
> someone is successful. And then they provide feedback and additional follow
>
> up as the time frame suggests.

In her role as an instructional leader, Miss M worked as a school-based instructional

coach and now is employed as an independent instructional coach who conducts

professional development for several schools across districts. She believes "part of my

role as a facilitator is not just to deliver information, but also to empower teachers so

that they become teacher leaders, and they can facilitate and share their learning." She

explained that an instructional leader should "hav[e] different collaboration methods,

[and] hav[e] ways for accountability and keep participants accountable so nobody gets

an opportunity to hide in a professional development." When reflecting on her

planning and implementation of professional development, Miss M said,

I think at the end of the day, I'm connecting with people is what I value with professional development, and being able to assist them in being successful in any way I can. At the end of the day, I want to create a platform as a facilitator for professional development to allow teachers to share and articulate how this impacts them as a teacher and how it impacts student learning as well.

When asked to describe the work she does with teachers, Miss M said, "it's kind of like dealing with people in a very diverse environment and giving them what they need in real time." In her description of the skill set that is necessary for an instructional leader to have, she felt the most important skill was the ability to build relationships:

As an instructional leader, I think one of the major things that you have to be is a people person. So I find a way to connect with people, kind of getting to know them, building relationships, because this is a major portion of it. Having this skill set to kind of read people and be able to meet them where they are is very, very important. Also, I think that kind of getting to know where they're coming from and their goals and aspirations is equally important. So where do they see themselves because I can't help a person who can't see themself beyond the moment.

Miss M also highlighted presentation and communication as tools that impact the success of an instructional leader and an educator's work. "Another tool I think is really, really important is knowing how to present information. Having clear and explicit directions is a tool that I think every facilitator should have." She went on to elaborate,

I think that's part of what comes out and what I want to come out of those

professional   development [sessions]. That is a realization that as teachers we

have a certain set of tools and skills that can help us be successful at teaching.

I make those connections throughout their professional development. I'm

demonstrating that we already know some things that we can pull in to be

successful as a teacher.

With regard to the skill set of instructional leaders, Miss M also clarified that

personality is important to the planning and implementation of professional

development, which was a mindset demonstrated in the instructional decisions that

occurred during the observation as well. She stated:

I don't like to toot my own horn, but I can say that on my personality, a lot of

times in professional development, and I've been told this by participants and

people that I presented with in the past, that I have a natural way of controlling

a room, and kind of reading people. And so I think part of my personality

increases engagement. Part of me sharing my life experiences increases

engagement, showing them and then being able to articulate the need and

making those connections, increases engagement for them.

Miss M believes instructional leaders should empower, assist, and connect

with teachers to support their growth and development. She referenced her role in

planning and implementing professional development as a platform for participants to

learn and then reflect on how new knowledge can be integrated into their own work.

Clear and explicit instruction and knowledge of participants were two areas of focus

for Miss M; these areas also demonstrate her belief that an instructional leader is an

expert in that he or she can assess a teacher's skills and needs and then utilize her own

knowledge and expertise in the planning and implementation of learning sessions to

help participants "be successful as a teacher." She also mentioned personality as a

driving factor behind an instructional leader's effectiveness, demonstrating a belief

that instructional leaders have capacity in a way that is somehow different from other

educational practitioners.

Planning

When reflecting on her role in relation to planning professional development,

Miss M explained that knowing her audience was her number one priority:

> So when I initially start thinking about planning, professional development,
>
> whatever the topic may be, I always consider who the audience is because I
>
> think it is essential to know whether I'm talking to a group of K-12 teachers, 6-
>
> 8 teachers, high school. The personalities are different. And what kind of
>
> successes or struggles do they have? Who's my audience? Are there
>
> opportunities for them to engage and collaborate with their colleagues?
>
> Meeting them where they are and understanding what things they are already
>
> doing in the classroom, I can easily connect and build a point of reference and
>
> build some background and prior knowledge.

She went on to further explain that when planning and implementing a session,

consideration of attendees drives everything:

> At the end of the day, I have to know who my audience is and what they're
>
> bringing into that PD session...if I'm serving all of those teachers in some

capacity and supporting them in making observations, providing feedback, and giving resources, I look at the trends and patterns of those teachers.

When asked to expand on how she defines or thinks about the participants that make up her audience, Miss M said, "I think a participant can be anybody who feels like they can gain knowledge from whatever it is that you're talking about and how supporting that is key at the end of the day." After reflecting on how the planning and implementation of the observed professional development represented the audience of adult learners, Miss M explained,

> Part of PD is addressing a situation and having [teachers] talk through that situation and coming up with possible scenarios that here's the problem, how can I critically think through this problem as an educator from what I already know, and my prior experiences, and my prior learning, to create a different approach, so that I get the maximum experiences for my students, the maximum learning for my students and a maximum learning experience for myself.

When considering her mindset regarding how and why she makes instructional decisions when planning and implementing professional development, Miss M described a process in which she challenges teachers by presenting scenarios or problems and then asks teachers to draw conclusions and explain their reasoning.

> I play devil's advocate a lot when it comes to professional development. So I may challenge the teachers within the PD to say, okay, this is what this person is saying and this is what these experts say, who do you agree with more? And then we'll start to practice on possible scenarios. Scenarios are always good to

embed in professional development because it seems more realistic to teachers.

She also went on to explain that in her planning she incorporates opportunities for rating understanding or experience with the topic/information presented. "I usually use Likert rating scales a lot so teachers can rate themselves to be reflective." In addition to these reflection periods, she said that an end of session survey was an important part of future planning, in that she utilized that data for planning future sessions. She stated:

> There's always a survey that comes at the very end, and I'm very upfront with the participants to say I want you to be as honest as possible. If you did not like something, that's fine, tell me you did not like it. The survey is anonymous, so they share their insight and things they would really like to see more of or something additional. They play a part in their own professional development. They may not realize it, but they play a very integral part in their own professional development.

Another consideration that Miss M highlighted as impactful to her planning process was the purposeful creation of moments for teacher collaboration, talking, and sharing. She explained:

> I like to create time for teachers to talk and during those teacher talk times I really like to circulate to see what the teachers are sharing with each other, what are their concerns, and then I take that as a building point to kind of embed into the very next section of the PD. So at some point, I want teachers to talk. I want them to share, but I intentionally wait for them to share either

virtually or just share it out loud. The best practice is to get them to feel like this is not about being a non-volunteer and waiting it out, I just want to get them involved.

That said, Miss M was clear that she favors flexibility in her professional development planning and that sometimes implementation of the professional development can result in a different plan than what was initially decided. She stated:

I can embed those things very organically into professional development knowing it may not have been in the plan. But some of the most teachable moments are not always in the plan, and so I think that's my premise. When I go into professional development, yes, this is what was my plan, but here's a very teachable moment and here's something that we can dive deeper into that may take us somewhere where we really need to go versus "Look, my plan initially was this and I'm sticking to it." Again, I let the teachers kind of drive that a little bit.

When asked following the professional development observation if she implemented the professional development the way she had planned it, she said:

There may have been some things that I wanted to discuss that I feel like were high need. But in the current working environment and teaching environment right now, I felt that it was equally important to give teachers what they need in real time. I did not want to miss that learning opportunity for them. Because if it was that present for them to discuss it, I felt like it was equally important for me to talk about it and address it.

Finally, Miss M went on to explain that "time of day, to me, impacts professional development." Not only did she explain that the scheduling of the professional development can be influential on the outcomes, but she also highlighted that time of year impacts her planning and content considerations:

> I'm very intentional about having conversations with teachers about where they are in a school year and what they could possibly be experiencing during that time. If they've just sent home progress reports, if this a typical time of the year where they've just had their first observation, or if this is a time of the year where they've had they to engage in parent teacher conferences, I always try to pull those real relevant things that are happening to them beyond that PD, so I'm always thinking about having a pool of things that are very real to them and so they have somebody they can really talk about things with.

When considering the content of the plan and what activities and strategies to include, Miss M responded that "part of what [her] thinking was, is how I can solidify this in a way that teachers can easily receive this information and can go back and apply this information quickly in their classroom?" She explained that when moving forward with the planning process, she sometimes adapts her plans and creates different versions of sessions to address the needs and wants of the districts or schools in which she is presenting. Miss M explained:

> Moving forward in the planning process, I would probably create maybe four or five different versions of this so it looks a little different. I had to keep it generic enough in the presentation that when a specific content was highlighted, that I could align and give examples relevant for all. And because

of the districts that I currently serve, a lot of them have different needs. I always think about myself in a professional development [workshop]. I always look at it from the lens of if I were sitting in that chair and getting professional development. And so at some point, if it does not address my needs, and I don't see any immediate addressing of my needs, I'm disconnecting. Making it personal to them, says that it's about me, and they are aware of my concerns. So I think making it personal, and that's in any situation, gives you some buy-in and makes people willing to listen to you.

She also went on to explain the resources and documents that she feels are important to plan and then share with participants during the professional development, stating:

Anytime that you can create a graphic organizer that they can implement and jot thoughts in quickly helps them to process things I'm providing. Linking resources within documents makes it easy because everything is there in one place. Um, those visuals really, really help those teachers, because those are things they can print out and make reference to them quickly...I think the graphic organizer piece, the visuals, any kind of short recaps and links to things all in one document helps them to process things a lot quicker.

Miss M explained that she utilizes a hyperdoc as a way to share links, information, and content with teachers. "I try to make sure that they have a copy of that graphic organizer, or that digital tool that we've talked about." She also explained that these documents should be referenced after professional development as resources for future skill mastery and strategy ideas, stating, "You can implement one of these

things along the way, and you become good at one of these things, you can continue to add on as the year progresses."

During the analysis of the hyperdoc and slide deck that was provided by Miss M during the study, three strategies were listed, and one was linked to an outside resource that teachers could access on their own time. The hyperdoc consisted of a bulleted list of "Things to Remember" and "Be Sure to Include." No explanations or details for the items on the bulleted lists was given, though the terms did connect with the slide deck that was also shared. The slide deck consisted of 16 slides for the hour-long professional development session. Slides for group norms, session outcomes and alignment to the teaching standards were present. Activities and content that was shared verbally by the presenter were also listed on the slides, including an opening activity that asked teachers to reflect prior to beginning the professional development content related to the session topic.

Figure 1

Miss M - Get to Know You Slide

Definitions, bulleted lists, charts, and images were included. A graphic organizer titled "Activating Prior Knowledge" asked participants to fill in columns titled, What

would you do in the classroom?, What are options in the virtual world?, and What are

my look fors/criteria for success? This organizer was to be used with a definition of

Authentic Formative Assessment by Grant Wiggans (1998). Miss M explained the

chart as follows:

> There's a chart within the professional development that they had to kind of
>
> talk through and collaborate with to say, this is the accountability, this is what
>
> it looks like virtually, this is what it looks like face to face. This is what I'm
>
> looking for, and this is how I'm going to provide my students with feedback.

An additional graphic organizer asked teachers to explore strategies and

consider them in relation to virtual teaching, accountability, look fors/criteria for

success, and feedback. A final activity, "Drop the Mic," asked teachers the following

question: What was your takeaway about formative assessments? The last slide of the

deck outlined a professional tip of the month.

Figure 2

Miss M - Graphic Organizer Slide

Instruction, Guided and Independent Practice

Implementation Strategies	Virtual	Accountability	Look Fors/Criteria For Success	Feedback
Instruction: • Direct • Collaborative • Project Based *Should be a balance of all remotely*				
Collaboration				
Accountable Talk/Seed Question				
Writing Critically/Type				

The language used in all planned materials was directive and highlighting was applied to those words and phrases that Miss M wanted to emphasize. Directive phrases like "Remember to…," "RESPOND to needed emails," and "Check your emails frequently throughout the workday" were contrasted with reflective question prompts such as "Do you think this is the best way to do it? Why or why not?" and "What are your next steps?" This directive language was explained by Miss M, who said:

> I do a lot of scaffolding. I can't assume that this teacher knows this or that teacher knows that. So I do a lot of scaffolding for that reason alone, which is, again, good practice that we try to model with teachers, and students. I've never assumed that someone knows anything. One of our first activities is always about building background knowledge.

> Miss M's desire to know her audience is relevant both to address who she is talking to and how to address them reflects adult learning assumptions in that she is making an attempt at recognizing her learners and the real knowledge, skills, and experiences they carry with them into the learning session. This is reflected in her use of surveys and Likert scales and purposeful creation of moments for teacher collaboration, talking, and sharing. That said, it is clear she feels as the instructional leader that she has knowledge to share and she relies on her own expert mastery to plan and implement professional development, a reality that is also referenced in her desire for flexibility both in planning and implementation of the PD sessions she presents. While she expresses intentionality in her planning and implementation, she operates from an expert-apprentice model of learning that recognizes participants but also provides guidance based on the

instructional leader's own knowledge and experiences. This can be seen in her approach to planning, the flexibility she uses in her implementation, and the documents she creates and shares for the learning session.

Implementation

When asked about how she approaches presenting professional development as a facilitator, Miss M said,

> In order to learn from whatever experiences you're having, you have to be fully engaged in it, and so just sitting, getting, and taking notes is not the way people naturally learn. So as a facilitator, I want them to guide, I want to create activities where they're involved, and they're building off each other's knowledge.

She went on to explain that in the beginning of a professional development workshop she likes having an activity that activates their prior knowledge and for a closing activity she focuses on connection. "Usually my closing activity is for them to connect to something, to commit to something that we've implemented, [and] talk about how what they've learned in that particular PD session that has impacted their practice." This practice was demonstrated in both the slide deck and the observation. She further expanded on why she implements these activities by stating, "I think that empowers teachers and encourages them to participate, the fact that you're acknowledging who they are, and what they are doing every day in the classroom."

When asked about her desire to have teachers reflect during the professional development session, Miss M explained,

I always want to touch on those teachable moments with the teachers as well. I

want them to have a voice and understand that their opinions need to be heard.

And I want to hear their opinions, and I want to hear their insight.

Furthermore, reflection and questioning were trends across the case studies. Miss M utilized questioning not only used for reflection but also as a check for understanding. She asked them, "Do you think most teachers get to this scaffolding? In the blue? Do you think it's remembering understanding, applying, analyzing, evaluating, or creating? Tell me where do you think most teachers fall?" and as a method for obtaining information from teachers, she asked, "Because in the K-2 world, how do you guys usually teach?" She referenced this in her interview, stating, "I ask those questions to get a gauge of how much they know and to build a relationship between the participant and myself. It's also a great platform for teachers to build relationships amongst one another." In addition, rhetorical questioning was utilized by Miss M frequently; she would ask a question and then follow by telling participants the answer. "And it's very difficult to build community in a remote world, right? Right."

Miss M further explained her use of questioning in relation to implementing professional development in the moment with teachers. She said:

I think questioning is a very persuasive technique to draw teachers in, so when

I pose questions to teachers, it's out of concern, and I think they can see the

genuine concern. But sometimes I think if we just give, give, give, give and

never ask a question, and don't be intentional with those questions, that people

again get disconnected.

Much like the flexibility she referenced when discussing her planning, questioning during implementation of the professional development was also seen as something that would be adapted in the moment. "Sometimes I have one question in my mind that I want to ask, but reading the room allows me to ask another question." She also explained that she uses questioning to support teacher self-identification of strengths. "Some guiding questions when I ask teachers to share, I like for them to know that they know more than what they think they know. That they're doing some good things in their classrooms; that they're doing some good things for the profession."

Also present during Miss M's implementation of professional development was the sharing of her own personal experiences and teacher experience "stories" that she connected to the content shared. Miss M explained,

> What I found is sometimes if I pulled a video and I shared it during professional development, there's an immediate almost disconnect because most teachers say, you know, well, that's not the environment I teach in; that's not realistic, this was staged. I'm sorry, I like to bring in real world teacher scenarios. More than anything, I like to make myself vulnerable in the professional development, so I talk about my teaching experiences and I admit to my hang-ups and, you know, my shortcomings as a teacher and things that I was successful at and lessons I learned along the way. And they tend to evaluate it because again, it makes it personal. It makes it seem like I'm a real person that I don't know all that and that at some point, I had the same struggles, so they immediately almost connect to me.

Miss M also connected this shared experience, both facilitator to teacher and teacher to teacher, as a learner engagement technique and the relationship building she says is so important in her planning process:

> What motivates teachers to learn is, again, how is the facilitator tying this back to who I am and what I need at the end of the day? I think that empowers teachers and encourages them to participate, the fact that you're acknowledging who they are and what they are doing every day in the classroom.

She confirmed that shared experiences are something she implements during professional development presentations. "I incorporate teacher experience, I try to keep it anonymous sometimes, but teachers value real world scenarios." Miss M also expressed that teachers need to see themselves in the learning and sharing experiences can give clarity to problems that may otherwise prevent participants to be fully present, "a lot of the participants, they bring in a lot of barriers to their own personal learning and that's to no fault of their own."

Active engagement and planning and implementation of activities were an area of focus for Miss M's planning and instruction. In addition, reflection and questioning were areas that Miss M incorporated as a way to empower and encourage participants to translate learning from the session into their daily practice. Again, flexibility was mentioned with regard to questioning and "reading the room" for needs and learning gaps. Though she explained utilizing questioning to support teacher self-identification of strengths, her facilitation and self-selection of the questions demonstrates her facilitative approach that draws on her own experiences for need

identification and participant learning. This is also supported in her use of shared experiences - both hers and participants - that she utilizes in professional development implementation to encourage participants to see themselves in the learning and apply new knowledge to previous or current teaching experiences.

Analysis

The first two research questions were explored via a within case analysis. In summary, the ideas and theories utilized by Miss M to plan and implement professional development for the teachers with whom they work included that she views an instructional leader as a facilitator for teacher growth, and she believes in building relationships. She did not feel that an instructional leader should tell teachers what to do, but instead believed her role to be facilitative and supportive to ensure participant buy-in and ownership over the learning. That said, Miss M feels instructional leaders are experts in that he or she can assess a teacher's skills and needs and then utilize their own knowledge and instructional decision-making in the planning and implementation of learning sessions. She also identified key skills for an instructional coach as being an ability to communicate and having a personality for making connections. She desires knowledge of the professional development participants for which she is planning and presenting and adheres to having flexibility in the moment based on her perceived audience needs. How Miss M's ideas and theories informed her planning and implementation of the professional development were evident in her utilization of questioning and assessing teacher needs and current readiness, and her planning and implementing opportunities for teacher voice and reflection. Additionally, Miss M incorporated strategies and a hyperdoc of resources

for teacher access and future use and shared her own personal experiences as a teacher

to make her professional development more engaging and connected for participants.

Due to her beliefs and desire for flexibility, Miss M does not always implement

professional development as initially planned and instead embraces "teachable

moments" to direct conversations.

The term strategy for this study refers to a teaching technique, approach, or

specific process that can be used to teach content or engage students. For example,

Miss M referenced the 10 and 2 strategy in her hyperdoc and professional

development session. This is considered an engagement strategy that encourages

teachers to pause after 10 minutes of instructional explanation and allow students to

do something to process or engage in some way with the information that was shared

during the previous ten minutes of teaching. Furthermore, the term collaboration is

considered any activity, discussion, or moment during professional development that

encourages and promotes participants to engage with each other and/or with the

instructional leader. Many forms of collaboration were considered for this study,

including small group discussions, whole group discussions, coproducing thinking

and/or working on activities with others, and swapping ideas as a collective. Finally, a

teachable moment is defined for this study as an opportunity to make connections

between teacher understandings and professional development content in a more

meaningful way. It is a spontaneous, unplanned opportunity for the instructional

leader to provide special insight into a topic of interest or question from participants.

Considered a brief aside from the professional development topic or planning, it

allows the opportunity for the instructional leader to briefly address or converse on a topic of interest or timeliness to the participant.

Based on Miss M's comments it is evident that instructional leader beliefs and ideas regarding the planning and implementation of professional development have an impact on the content and presentation that teachers receive. This unidirectional approach to coaching is reinforced by her beliefs that she is a facilitator of knowledge who supports teachers to grow into leaders. While she values participants' experience and desires attendee agency over the learning, she also feels that as the instructional leader her experience can be used as a model of success for participants; this is also reinforced through her narrative around storytelling and her sharing of personal experience. Additionally, it seems that Miss M's practitioner preferences result in professional development that is based on personal understanding of what learners need, though some data collection in the form of surveys and teacher voice can shape her decision making. The analysis of this case study illustrates the importance of instructional leader expertise and objectivity when planning and implementing professional development. Table 4 summarizes the data from this case.

Table 4

Miss M

What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?	*How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?*

Views an instructional leader as a facilitator for teacher growth	Questioning and assessing teacher needs and current readiness are present
Believes in building relationships	Provides space for teacher voice and reflection
Key skills include personality for connecting and ability to communicate	Incorporates strategies and hyperdoc of resources for teacher access
Desires knowledge of professional development participants	Shared teacher and facilitator experiences make professional development more engaging and connected for participants
Desires flexibility in the moment based on perceived audience need	Does not always implement what is planned and allows for "teachable moments" to direct conversations

Ms. I

"My mantra as an educator, as a classroom teacher, and especially now as an instructional leader, is to see the potential."

Instructional Leader Beliefs

Ms. I, an instructional leader and independent contractor, believes in the power of mentoring and working as a support person for classroom success. She explained, "I always felt that mentoring and support and orchestrating valuable professional development was key to our success in the classroom." Her definition of an instructional leader is founded in this mindset as well, as she stated,

> I feel like people come to teaching for a reason and it's our responsibility as instructional leaders to support them in any way we can. I frame everything to see the potential, so my goal in leading professional development is to elevate my teachers' teaching experience, and thereby the educational experience of their students.

Self-employed as an educational consultant and instructional coach, Ms. I worked as a team lead in a middle school and held a position as the leader of the Academically or Intellectually Gifted (AIG) committee. After serving in various school-based leadership positions, she took a job as an instructional coach with a statewide program and now is contracted independently to conduct professional development and instructional coaching for different schools across the region and supporting beginning teachers in their first three years of working in the teaching profession.

Ms. I believes "professional development is teaching," and "just like we differentiate for students and we expect our classroom teachers to differentiate, we need to differentiate for our teacher learners as well." She explained that as instructional leader she "want[s] to elevate [teachers'] teaching experience through accessible and engaging professional development to elevate the educational experience of their students" and she views professional development as "instruction that provides teachers with the tools and strategies they need to be effective in the classroom and offers a venue where [teachers] can see modeling and also practice and discuss and collaborate on all those things." When reflecting on her planning and implementation of professional development, Ms. I said,

> Good planning positively impacts the PD, and it positively impacts the teachers because there's reasoning behind how I lay out what happens in the PD. So key to everything is good planning. I think the value of a professional development session shows up in what the teachers do with it because you can really provide great instruction and give them lots of tools, but if they don't do anything with it, then I'm not sure about the value of the session. So that is

always in the back of my mind as a presenter, like, what are you going to do

with it?

When asked to describe the work she does with teachers, Ms. I said,

On a deeper level, I want them to start getting students to think critically. I'm

really pushing teachers to go more toward critical thinking and higher order

thinking. And I think that the tools I show them force students to make

connections and that's where that higher level thinking comes in.

In her description of the skill set that is necessary for an instructional leader to

have, Ms. I felt the most important skill was the ability to encourage teachers to see

their own leadership potential.

I think that it's so important for beginning teachers to understand that they can

be exceptional instructional leaders. I try to bring in people within the same

sort of level as them so they'll see like, you can do this too. This is not out of

reach for you. I really love them. I love teachers, I think that especially now

they're heroes. And just to be a beginning teacher in the setting right now,

during a pandemic, I just really think they're wearing a lot of hats and so I'm

driven by my passion to support them during the session. And I love seeing

them. I love hanging out with them. I love hearing what they say. I love

teaching them, and I love getting their feedback.

Ms. I also noted that an instructional leader's work must be grounded in research, best

practices, and strategies that teachers can utilize immediately. "I am big on research-

based thoughts and ideas and strategies and tools and platforms to help me design my

professional development. I access [research] because I know there are great, quick,

good classroom management tools that are research-based that I can share with my teachers that they can implement the next day in class." She went on to elaborate,

> Often what motivates a lot of teachers is the required certificate for the PD. I mean, I'm just being honest. But it's my role as an instructional leader to get past that to make it more than that, that it's real and it's authentic, and it's usable. And it's usable the next day with their students, and whatever I give them, they'll be motivated to use for their students.

Ms. I also felt that getting to know teachers and seeing their needs was an essential skill for an instructional leader. She explained that personalized learning is important since many times struggling teachers do not know what they need or what areas of growth they need to focus their learning on.

> I immediately get to know my teachers and see their needs; I plan personalized professional development based on what I see they need within their classroom. And I find that really does vary from teacher to teacher and year to year, so I do my very best to align my PD with the needs that I see through my instructional coaching. I try to discern through the conversations, what the missing pieces are for them, what is not evidence to them? What is not coming easily? And how can I provide them with tools, strategies, and resources to meet those needs? Because I find, especially with the beginning teachers, they don't always know what their needs are.

Describing instructional leaders from a mentoring perspective, teacher support and elevating the teaching experience were seen by Ms. I as the driving purpose for professional development planning and implementation. Her approach to learning

sessions was from a pedagogical perspective and she described professional development as teaching with the same type of differentiation that is completed with students. Her belief that planning drives learning session effectiveness was demonstrated in her frequent references to utilizing research and having an understanding of how new knowledge would be implemented after participants complete the PD. Helping teachers to identify their leadership potential and seeing participants' needs demonstrated her belief in instructional leaders as experts due to their own personal experiences and leadership roles.

Planning

When discussing an instructional leader's role in planning professional development, Ms. I explained that engagement in work that directly connects with teacher needs was crucial. Ms. I stated:

> So to plan, I want the professional development sessions to be engaging, so that they'll listen and retain. You identify the need, you then think about the research-based strategy that would meet that need, and then you use modeling and have the teachers internalize. Because if I don't model, they won't know what it actually looks like, they won't experience it, and I want them to try it with their colleagues. If they don't practice it, they won't feel like they won't know what it looks like. And to internalize it, they have to know that it applies to the students they teach, the content they teach, the grade level that they teach, and they have to try it in a way that will work for them.

She went on to further explain that consideration of direct instruction and collaboration are necessary when planning and implementing a professional development session.

> One of the reasons I love [professional development] so much is because I think all instructional leaders are, at least good ones are, teachers at heart. So I do have a direct instruction. I have a portion of the PD where I tell them about what we're going to do, then I want them to experience it, and I want them to practice it. Collaboration, I think is super important to make PD engaging and memorable. So, for collaboration, I put them in groups; we do grouping. We have discussions. We have Socratic type seminar components. I usually have an article or a video or something of that format that they'll watch, digest, and then share. So collaboration is a big one.

> When asked to expand on how she defines or thinks about collaboration and the participants to whom she is presenting, Ms. I said,

> I think collaboration is key to engagement, and I also think that as presenters, sometimes we forget the value and the knowledge of the people that we are leading, especially with first year teachers. I think because many of them are straight out of universities and they have been exposed to the latest and greatest research, they have a lot to offer to each other.

When asked how her professional development plan and implementation of the observed session represented the audience of adult learners, Ms. I explained,

> I believe that adult learners, teachers in our case, need to understand that what we're teaching them we have done and we still do. I think if my teachers view

me as a teacher, then they're going to buy in more to the strategies I'm trying

to get them to implement. I believe that research and theory are very

important, and I plan my PDs around research-based instructional strategies. I

think in my delivery for beginning teachers, it's important for them to see that

this is real, it works. It's worked for me, and it can work for you.

When considering her mindset regarding how and why she makes instructional

decisions when planning and implementing professional development, Ms. I

expressed that teachers must be exposed to tools, see their value, and then take on

ownership of doing the work after a professional development session. As Ms. I

explained:

I've tried to show them that the strategies that I am presenting they can adapt

to fit the needs of their students, and so I always try to give them strategies.

And the understanding is that they have some follow up work to do, that I

show the strategies and then they look at this content specifically and then I'll

follow up with them. I want them to feel comfortable with it, and I want them

to see the value in the tool. I want them to feel comfortable using those tools,

and I want them to see the value in the tools and engaging their students and

having them think critically.

She also went on to explain that she utilizes surveys in her planning to understand

teacher needs and experience with the topic/information presented. "I have to probe

that through surveys. I might do a poll or a survey." In addition to this collection of

data for teacher need, she said that an end of session survey and the feedback she

received is used for future planning and areas of focus in her instructional coaching. She stated:

> I give the teachers a survey, a feedback survey, and I asked questions like "Did this meet the needs of your role as a first year teacher? How likely are you to use strategies we covered today? What strategy will you use today?" So I get that sort of feedback. "What was the best thing about the PD, how could it have been improved?" So I assess my PD through their feedback. I'm going to look at their comments, and I am going to slow down and give them more time based on the survey. And then I always ask a question like "What future topics would you like to see in professional development?" So I will use those responses to plan other professional development. I will use what they said.

Another consideration that Ms. I highlighted as impactful to her planning process was the purposeful creation of moments for sharing their expertise:

> I think often we restrict student thinking by giving them very specific guidelines. I present the tools and then read the room and try to elicit responses from them by asking questions. I also like to have them formulate questions and answer them because I think if you can formulate a question then you'll find the answer and understand better what you want to get from it.

That said, Ms. I was clear that she does not always plan her questioning and moments for reflection prior to the implementation of the professional development session. In addition, she explained that knowing her audience can impact how she develops and deviates from her plan during a session. She stated:

I think essential things are knowledge of my audience. A participant is always in, they listen, they share, they ask, they collaborate, they answer, they answer questions, they ask and answer questions, they formulate questions. They ask "Why, why are we doing this? How can I do this?" Knowledge of the participant determines my moves. So they really do impact the flow of PD and what I incorporate. My questions are not planned, it just seems natural. Like I read the room and ask a question that seems appropriate at that time within the instruction. If I see blank stares, I feel like I need to prompt them a little bit with, you know, asking a question that relates.

When asked following the professional development observation if she implemented the professional development the way she had planned it, she said,

I had three components that I wanted to cover, and I wanted to incorporate collaboration with them so that they would implement that strategy with their students. And my reason for that is because their constant concern and requests for help from me is that students aren't motivated and they aren't turning in their work. And I believe that as the instructors, they need to provide something to make the kids show up, and encourage them to do something, so that was my planning in my PD. That's how I planned the PD around those three things, so I felt that it accurately aligned with the planning.

Finally, Ms. I went on to explain that "timing of the PD is huge and often that is out of control for really anybody." She elaborated that scheduling times of professional development impacts learning, and the time of school year impacts her planning and content considerations.

I think a real hurdle we have to face as instructional leaders is being cognizant

of the workload on teachers, and then requiring more time of them and

professional development. It's not good to have a PD session after school the

day before grades are due, so I think timing can negatively impact PD. So I

think it's really important that when scheduling the PD it is very important to

consider what's going on. Teachers are tired, kids are tired, and they need

something to shake up instruction. And so I feel like this time of year

especially, that kind of waning time near the end of the semester you need to

consider what's going on when planning and presenting.

When considering the content of the plan and what activities and strategies to include,

Ms. I explained that district initiatives and school goals can shape the learning. She

explained,

PD typically within a district serves teachers K-12, all content areas.

Sometimes it's difficult to be super specific for the needs of their very

classroom, so if I offer different platforms or ways for them to practice within

their content area, and then they they decide how they're going to use it with

their students, then they'll be more likely to use it, rather than it being like a

one and done PD. Yay, I got the credit for the meeting and I'm not ever going

to actually use this with my students.

She explained that when going through the planning process, she focuses on having

participants show their thinking and engage in the content, rather than just passively

experiencing it.

I look to researchers that I know that have done a lot of great work with whatever content I'm planning for, you know, John Hattie, Marzano, and graphic organizers, thinking maps, Zorita Hammond, and culturally responsive teaching. I gather all those things and then I start with a planning document and I make sure that I include all of the things I want to do, like, is there a collaboration piece? Am I doing sort of formative assessments or check-ins as I go to make sure they're with me? Are they understanding? And then, might they have a chance where they create themselves? So I've done the direct instruction about the content, you know, what is that? What does it look like? And then I'll have them do one; I'll have them create and do a graphic organizer or something like that of their own that would work with a lesson that they have.

She also went on to explain the resources and documents that she feels are important to plan and then share with participants during the professional development. She stated:

 I always with all of my PD share a hyperdoc so that all the tools and strategies and links and ideas, videos, whatever that we've used, they have access to later. And I always do sort of an enrichment piece too because I really want to tap into the teachers being lifelong learners and taking it a little bit further. So I give, you know, an opportunity for them to have access to the research-based articles and tools that I pulled from.

Ms. I explained that the activities she incorporates always connect with engagement and takeaways for future implementation. "I reference all the PD books that are about

what makes good professional development for teachers and adult learning theory and all those sorts of things." She also explained that the goal of what is shared is to have the teachers be motivated to use what they learn and are exposed to during a professional development session. She explained, "I think they're also motivated to get stuff to use in their classroom, whether it's templates, or you know, warmups or exit tickets, or videos, or strategies. And so I think they're motivated by knowing I'm going to come to this PD, and I'm going to leave with something that's going to make my teaching easier. It's going to elevate my teaching experience."

During the analysis of the hyperdoc and slide deck that was provided by Ms. I during the study, four strategies were listed with several links on additional resources for each topic offered. The hyperdoc consisted of different sections that highlighted a topic or asked a question and then provided detailed explanation or additional resources for review. A section entitled, "Why Visible Thinking?" listed 14 reasons to provide students with opportunities for authentic intellectual engagement. The slide deck consisted of 29 slides for the hour-long professional development session. Slides for group prework, an agenda, and background knowledge on the topic were present. Activities and content that was experienced by the attendees were also listed on the slides and hyperdoc, including a slide that asked teachers to consider how the content presented could be implemented with their students.

Figure 3

Ms. I - Reflection Slide

Strategies were presented, explained, and then followed with an activity that required participants to engage in the strategy themselves. A collaborative activity that required attendees to work in small groups within Zoom breakout rooms was used to demonstrate how to apply the strategy of hexagonal thinking. Ms. I elaborated on this element as follows:

> I specifically had the collaborative work in the breakout rooms. You know, at the beginning, after we talked about what visible thinking is and why. And then I wanted them to be able to practice two of the strategies. I didn't think we could practice one pagers. I mean, we could, but because of the time constraints, we really couldn't, so I strategically planned that we would do the hexagonal thinking collaboratively in breakout rooms.

An additional collaborative activity asked teachers to apply the mind mapping strategy using JamBoard, an interactive collaborative platform. A final slide focused on the question, "To grade or not to grade" and contained resources that explained how to use each of the demonstrated strategies as an assessment tool. The last slides

of the deck reminded teachers about upcoming meetings for the beginning teacher

program and contained QR code to complete a session survey.

Figure 4

Ms. I - Strategy Share
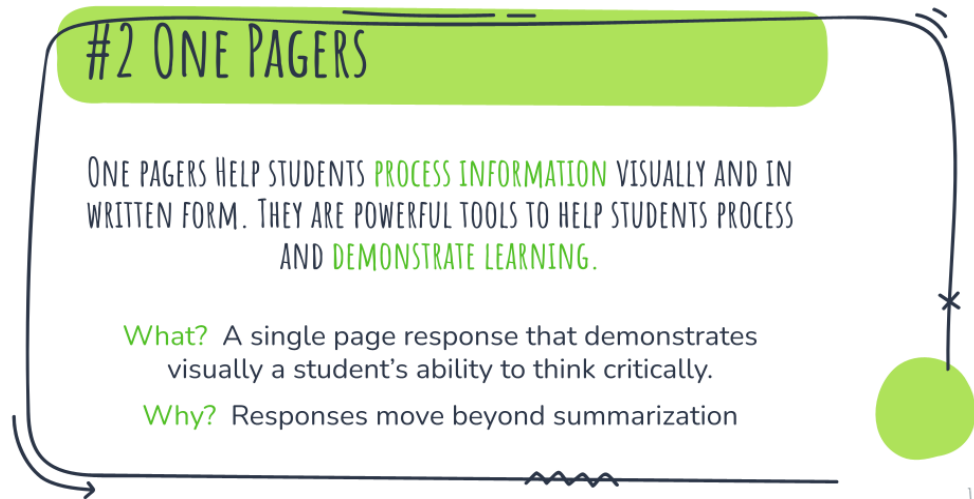
While Ms. I provided lots of resources for the teachers to explore as they

desired, the language used in both the shared materials and during the session was

directive. Phrases like "You need to keep an open mind on strategies," slides entitled

"Things to avoid" with a bulleted list of things not to do, and details describing how

something should be presented, "So you should say…" were contrasted with

reflective question prompts such as "So how can you use this with your classroom?"

and "So talk to me about your experience doing those mind maps...what positives do

you think your students would have from doing that activity?" Ms. I elaborated on this

contrast, stating:

> I think it's founded on my experience, as one who participated in professional
>
> development for many years, and then one who has led professional

development, because if it if it's not accessible, engaging, and clear then it's

just like, teachers are going to sit there for an hour, an hour and a half,

whatever, smile, nod and then never try the strategies, never use them. I need

to know that they have the ability to implement what I'm asking them to do.

Much like the other instructional leaders from the study, Ms. I believed that identifying

participant and teacher needs was essential for planning and implementing professional

development. This is demonstrated in her use of surveys and questioning for reflection.

She focused on engagement as a key component to learning sessions and felt that direct

instruction in addition to collaborative strategies were important to ensure participants

comprehended and then applied new knowledge. While she recognized adult learners in

that she expressed that participants have experiences and knowledge that can offer a lot to

others, she also was clear that participants see her as the teacher or expert in the learning

environment and as such she would share new knowledge for participants to then explore,

practice with and eventually take ownership of as a way to fill the gaps in their own

practice. Ms. I also felt that in-the-moment flexibility was necessary not only to adapt

learning sessions to her audience but also to help create momentum and engagement

during PD. This again demonstrates the PD presenter as a guide leading learners through

new knowledge, while also recognizing that agency over learning is important for follow

through and application of PD content to the future work of participants.

Implementation

When asked about how she makes decisions in the moment during a

professional development session, Ms. I said,

Well, you know, I read the room. Are they engaged? Are they understanding?

Are they playing on their phone and bored, you know? So that might make me

change something or shake it up, or hey, it's time to move. I do formative

assessments throughout where they're always showing me something; they're

evaluating something If I throw out something new, I always do this little

cheesy thing, which I can't believe they actually love and participate in. Like if

I say, I'm going to talk to you about formative assessments, if that's new to you

say new to me. And then if the whole room chants new to me, then I get a

feeling like a quick prior knowledge assessment that nobody's heard of it.

She went on to explain that while engagement is important, considerations about how participants engage must be considered. "So to make sure that they're engaged? There's a fine line, I believe, with adult learners, though cold calling on them can make them shut down." This was evident during the observation in that Ms. I repeatedly asked questions, but only had teachers share out if they volunteered after wait time. She further expanded on how the new virtual and remote circumstances due to the pandemic have impacted her implementation and engagement with adult learners, stating, "You know, they feel like they're being singled out. The goal would be 100% active engagement from all the participants. Show me what you've got. It just seems easier face to face. Somehow, virtually? It feels like I'm calling them out."

When asked about the role that adult learners play in her planning and implementation of professional development, Ms. I explained,

What role did they play? Well, I mean, you know, everything. They are the

focus, I mean, the reason I do it is for them to build their toolbox to help their

students so that they are the focus. And so I try to think of in the planning of things to use things that are simple for them and put a lot of resources in their toolbox to use right away to take some of the load off them. So they don't have as much time to do planning. Like, they don't have to go looking for one pagers or templates, because I gave them to them in a hyperdoc and so I can save their time. And then they can use their energies, you know, in instruction, which is what I really want them to focus on is instruction and critical thinking.

Much like Miss M, Ms. I utilized questioning for reflection and as a check for understanding, "Are there any questions?" and as a method for obtaining information from teachers, "Great. How did you do that? Did you do that in PLC?" In addition, questioning for reflection was utilized by Ms. I frequently; she would ask if participants had experience with what was being discussed and if so, ask those who did to share to the group. "Give me a show of hands if you've ever seen a one pager? Excellent. So what is it?" Additionally, Ms. I expressed that the questions that she utilized during a professional development session were not always planned prior. Instead she explained that questioning was something that would occur spontaneously. "My question is not planned, it just seems natural. Like I read the room and ask a question that seems appropriate at that time within the instruction."

During the observation, Ms. I relied on her own personal experiences to connect with participants and the content shared. Ms. I explained that these experiences help to demonstrate to teachers how the learning can be implemented in the classroom. "I think that my teachers have a grasp on their content area. I think

they're well versed in the standards, and they know what they're supposed to be teaching. I think what they need are ways to teach it." This shared experience, both facilitator to teacher and teacher to teacher, as a learner engagement technique was evident during the observation as well. "I love summarization and this just moves them along...we used this, I did this [gives example]...I would love to see someone do this on a wall in their classroom and it would help students to show them connections."

Planning and implementing engagement moments were important to Ms. I. While her references to utilizing formative assessments and engagement strategies echoed pedagogy for child learners, she continually mentioned a focus around how session knowledge would be implemented by adult participants, which recognizes adult learning theory assumptions of Need to Know and Readiness to Learn. Questioning for reflection was important, though determined and lead by Ms. I, and she utilized her own personal experiences and stories as models for learning session outcomes and examples of connections to content. This shared experience once again indicates an expert-apprentice relationship in the planning and implementation of professional development sessions in that the connections between the knowledge and the application is driven by the instructional leader.

Analysis

In summary, the ideas and theories utilized by Ms. I to plan and implement professional development for the teachers with whom she works includes her belief that an instructional leader elevates teaching experience and thus influences the student experience. This concept of elevating the teaching experience can be

explained in Ms. I's emphasis on seeing the potential in teachers and working to leverage that towards increased effectiveness. Ms. I's narrative around the work she does and planning and implementation decisions she makes also reinforces her belief that she should facilitate learning for teachers and provide resources that are needed by teachers. This belief in her role as a change agent is grounded in her approach to frame her work in research-based practices and critical thinking. She also desires knowledge about the professional development participants such as what they see as needs based on their personal realities, and she always attempts to work from teacher potential and strengths.

Ms. I focuses her planning and implementation on collaboration and in the moment instructional moves to ensure engagement. How Ms. I's ideas and theories informed her planning and implementation of the professional development were evident in her utilization of questioning and assessing teacher needs and present strengths, and her planning to provide space for collaboration and reflection. Additionally, Ms. I incorporated strategies and resources for teachers to gain greater depth of understanding, including an extensive hyperdoc and moments for application of shared strategies. Her planning and implementation of professional development illustrates her use of shared teacher and facilitator experiences to make the professional development more engaging and connected for participants. While this collaborative process encourages co-creation of knowledge and skills, it is directed and facilitated by Ms. I, a reality that reinforces her belief as a change agent who leads teachers to become leaders. Ms. I's case illustrated that instructional leader beliefs and ideas regarding the planning and implementation of professional

development have an impact on the content and presentation that teachers receive and continues the idea that instructional leaders' expert knowledge becomes the foundation for teacher effectiveness. Table 5 summarizes the data from this case.

Table 5

Ms. I

What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?	*How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?*
Believes an instructional leader elevates teaching experience and thus influences the student experience Grounds all work in research-based practices and critical thinking Desires knowledge of professional development participants' and works from potential and strengths Focuses on collaboration and in the moment instructional moves to ensure engagement	Questioning and assessing teacher needs and strengths are present Provides space for collaboration and reflection Incorporates strategies and resources for teacher to gain greater depth of understanding Shared teacher and facilitator experiences make professional development more engaging and connected for participants

Mr. O

"I like to believe that every teacher walks into a professional development session hoping to get at least one piece that will impact their instruction. And it's our job as instructional coaches to make sure they get that one piece."

Instructional Leader Beliefs

Mr. O currently works as an instructional coach at a university. Initially starting his career as an English teacher, he taught for seven years before moving into

the role of instructional leader. He is also certified as a level one trainer and presenter for a well-known literacy program. His desire to pursue a leadership position emerged when he began to see the lack of support for teachers and the subsequent turnover that occurred. "I jumped at the opportunity to be able to hopefully do the kind of work with beginning teachers to try to make those early years a little bit better than even what I had and what I have seen people experience previously." When asked to define what he thinks an instructional leader is, Mr. O said and instructional leader is,

someone who obviously stays up to date with the ins and outs of education research, relevant information that pertains to districts, state, and federal needs and initiatives, but [who is] also an instructor. An educational leader is someone who can identify and also help fix some of the gaps that occur from teachers entering the field...they can see those gaps, they can help those teachers, and they can help eliminate those gaps. And they also can notice where those gaps impact students and how fixing these issues can lead to a better educational experience for students.

He described his approach as a result of what he observed, stating, "What I noticed is that a lot of times the professional development that is offered to teachers sometimes does not always meet the needs of where they are right then and there in the school setting in their classroom." He then explained that his approach has always been to "bring relevant information to teachers, right then and there, kind of where they are. Meet them where they're at in hopes that it will impact them and improve upon their teaching ability quicker and offer PD that is fairly straightforward, that is engaging,

[and] that allows for participation." When reflecting on his planning and implementation of professional development, Mr. O said,

> What I have seen over the past several years is that we're getting more and
> more teachers in our professional development setting who are not
> traditionally trained in our universities. And so throwing out all the research
> terms, throwing out, you know, some of the more heady names for items that
> they do need to know eventually might sometimes cause the PD to fail. It may
> not actually meet their needs because they spend so much time trying to
> identify these new words, these new terms. It kind of gets away from the
> actual meat of what we're presenting.

When asked to describe the work he does with teachers, Mr. O said, "When a professional development is nothing more than someone lecturing the whole time, the chances of people actually retaining the information? They seem to dwindle. Boredom can set in quite early and frequently and easily." In his description of the skill set that is necessary for an instructional leader to have, he felt the most important skill was the ability to offer best practices for teaching:

> When I look at planning and professional development, I kind of base it
> around the structure of what a teacher should also implement in their
> classroom. So it's part of my guidelines that each professional development
> that I do have an icebreaker, that it offers session outcome standards, and then
> I dive into actually providing information with a strategy to go along with it. I
> give, if possible, an opportunity for the teachers, the participants, to try the
> strategy out on their own or at least to have an opportunity to talk with the

other teachers in the room about how they may be able to use that strategy in

their own classroom. I kind of wrap up with something that pulls everything

together, and then I have a survey exit ticket. So I try to somewhat structure it

around the average school classroom day and I implement those pieces.

Mr. O also highlighted interaction and modeling as tools that impact the success of an

instructional leader and an educator's work. "I do a lot of modeling in our

professional development sessions. And in the virtual world right now, I am relying

heavily on hyperdocs, and interactive pieces like Google, JamBoard, Padlet,

Mentimeter, breakout rooms through Zoom, [and] polling feature[s]." He elaborated:

Offering these opportunities to collaborate with colleagues to you know,

actually work within the strategies that are being modeled and presented, it

does increase engagement. It gives teachers something to focus on; it gives

them the opportunity to see that what they're learning in their professional

development is actually relevant to them, it can be used in their classroom. So

I guess, I try to plan on incorporating these activities simply because I believe

that it will keep the teachers hooked, and they will feel that they've not wasted

their time by sitting in the professional development session.

With regard to the skill set of instructional leaders, Mr. O referenced how

district and school initiatives can drive his practice. Mr. O stated:

As I mentioned earlier, protocols and initiatives kind of inform my practice of

the structure of professional development. Sometimes I am limited in nature to

exactly what I could present. Sometimes our school districts are very specific

in what they want...where the district has kind of directed me into what

information they want to see present. When I do get the opportunity to kind of

fine tune the topic more to what I observe in classrooms, as far as need based,

I like to kind of, I don't know, work with some of my colleagues and kind of

gather information as far as data from observations from students and work

samples, things like that, to kind of make sure that whatever is presented, the

strategy or skill, that it's exactly specific to what the district teachers are using

or needing at that time.

Mr. O believes an instructional leader should make the teaching experience better

for professional development participants. He describes an instructional leader as a clear

expert and owner of knowledge that supports and identifies the needs and gaps in

participate knowledge and practice. Meeting participants where they are and identifying

their needs is important to Mr. O, though he referenced best practices and leading

learners through content in a way reminiscent of pedagogy for children. That said, he did

recognize the need for adult learners to see their work in PD sessions and referenced data

use around participant knowledge as support for his instructional decisions.

Planning

When reflecting on his role in relation to planning professional development, Mr. O

emphasized that participant need and data regarding the audience is important.

I look at previous data and I kind of make my decision on what specific

resources to share during the professional development session, kind of based

off of those and what I think some of the obstacles that teachers might be

having in life. It's good to know the audience, it's good to kind of know what

initiatives the school district has in place. For instance, if I'm presenting a

certain tool that is to be used, like a technology tool, if it goes against the

district initiative or they have something in place that they're already using to

fill that need, I need to know that ahead of time that way I do not waste my

time planning it. I don't waste the teachers' time by presenting it to them if

they're not gonna be able to use it.

He further explained that when planning and implementing a session, consideration of

attendees and review of data is necessary.

Knowing the audience, knowing district expectations, district initiatives, really

goes a long way in helping to plan PD. I need to know when I'm

planning...things like student data, where the district is as far as the state report

card, where the learners are. It's sometimes a benefit; it's definitely beneficial

to know the content that the teachers in the room are teaching [because]

oftentimes, some teachers feel left out.

When asked to share his definition of the participants that make up the

attendee list, Mr. O said, "That's difficult because it is something that I think changes

year to year, district to district, and also region to region." After reflecting on how the

planning and implementation of the observed professional development has to

represent a variety of adult learners, Mr. O explained,

I think the main description of what my audience is, is a diverse group that is

just like a classroom. It's just like the students that we teach and all come to us

from all different avenues of life and level of experience. And so we have to

really work hard to hit each and every one of them and make sure they get at

least one or two things that do pertain to them and where they're at. PD

planning is easier if there is less diversity in the teacher makeup of the
audience. If you know that everyone is a lateral entry or residency teacher, you
know pretty much that you can kind of stick to one specific level, but when
you mix the group together, you have to be conscientious of what you're
planning and making sure that you're not offending one group or the other by
the way you present. It's a fine line that you have to walk when you present to
an audience that is diverse.

When reflecting on how and why he makes instructional decisions in a
professional development, Mr. O described the need to rely on prior knowledge and
input from colleagues to form his instructional moves, stating:

I think a key factor that plays into it is normally I have some data from
observations and working with at least a good portion of the teachers in the
audience. So I kind of use that data from the observations I've had in those
teachers' classrooms to kind of help me identify those needs. Normally, that is
always like the driving factor. It's based off of what I've actually seen with that
audience. If the situation is where I'm presenting to teachers for more than one
district or for participants from across the whole state, I kind of once again, I
use the knowledge of my colleagues from those areas, from what they've seen,
from what they've experienced and coached these teachers on to kind of help
me form what is the overall best piece to present.

He also went on to explain that in his planning he incorporates survey information
from previous sessions. "I administer a survey at the end of every professional
development that I provide. And that survey, it kind of hits on whether or not the topic

was relevant not only to the teacher and the content they teach, but also if it was presented at a relevant time to them as far as where they're currently at." In addition, he said the end of session survey is utilized for planning future sessions. Mr. O said,

> I can have that data. The teachers are allowed to also give additional feedback as far as the presentation. They're allowed to give feedback on what topics they would like to see next, and I really look at that anecdotal data to kind of determine where I move forward as far as professional development. So for instance, right now, I am at the beginning of the school year, and I am collecting that data in these early opening professional development sessions to really help guide me as the months progress right now.

Another consideration that Mr. O highlighted as impactful to his planning process is the idea of seeing the teacher in the content you are creating. He explained:

> As a presenter, you then have to take it upon yourself to access those teachers. You have to take it upon yourself to actually find out what they need, what they would prefer, so that you can make it relevant. I think a lot of people are asked to come in and present a professional development that is based off of what a non-teacher thinks is needed to make the teachers in a district successful. I think it becomes more or less something for an initiative, for a little check box. I have in the past been asked to give three professional developments revolving around literacy and I was simply told, we just need three professional elements on this topic. We don't care what you do. And when it's worded like that you feel like the district isn't really concerned how it comes off or how it comes across the teachers. So you then have to take it

upon yourself to do your best to make it as relevant as possible to whatever little bit you know about the audience that will be in front of you that day.

Furthermore, Mr. O explained that providing information according to best practice is what planning and implementation should focus on during an instructional session.

> I gave, you know, a lot of information, then I did the modeling. I did the small group activity, and then whole group and small group activities. I typically try to make that cycle go quicker, like I would like my teachers to see in the classroom. Once again, it's a best practice that I try to get teachers to implement in their classroom so that students aren't sitting and just listening to the teacher for long periods of time. It gives teachers and students alike the ability to take what they've just heard and immediately transfer and put it into practice in an activity or whatever it is that I'm having them do, so it's something that I like for my teachers to try to do as well. It's something that I try to model on each PD.

When asked if the observed professional development was implemented the way he had planned, he said,

> Yes, pretty much anything that was delivered that day had been pre-planned. I tried to choose strategies early on for this first professional development that would not only match the information but would also be able to be used hopefully, instantaneously by teachers in the remote learning environment, which is what those teachers were in at the time. So I tried to choose whatever I thought would work best for them and their students based off of my knowledge of their needs. There was a little, I guess you would say, hiccup.

Had I known that I was going to have way more teachers than I had originally

planned for, I would have had an additional moderator to help me basically

monitor the breakout rooms and also kind of help in the whole group session.

When asked about what negatively impacts professional development, Mr. O

explained that timing can negatively impact professional development sessions.

"Time is very limited, and so I think one of the barriers to professional development is

the time of the week and of the day before it's presented. I think that that can truly

determine whether or not a professional development session will be successful." He

also highlighted that time impacts planning, content, and implementation

considerations:

Honestly, one of the biggest factors that kind of determines success outside of

what I've kind of already mentioned is time is a huge factor. And there are

times when you can look at the clock and know that you're not going to have

enough time to cover everything that you present. And so you have to kind of

make those decisions, is the information the most important part? Or is the

engagement in the activity more important? And I think that depends upon the

audience.

When considering the content of the plan and what activities and strategies to

include, Mr. O explained that "when I sit down to plan a professional development for

a district or a specific audience, I try to think about what will be the timeframe that

we'll have and how to make sure that each piece of the professional development is

spaced out appropriately." He added that considerations about opportunities for

participation and engagement impacts his plan, stating:

There are opportunities for participation; there's opportunity for breaks. I really think about the overall flow of what will be happening as I sit down to plan and how one piece will move to the other, and how hopefully, by the time the session is over, everything has connected and the teachers can see the larger picture of how what's been presented will impact their teaching ability and what happens in their classroom.

Mr. O also referenced the resources and documents that he shares with participants during the professional development.

When I have professional development in person with my teachers, I usually have handouts. I have things that they can manipulate, like poster board and things of that nature, so that I can actually, you know, implement some of the strategies that I'm demonstrating. Right now in our current situation, my professional development is all virtual, so for the most part, I am using Zoom along with a Google slide presentation, a hyperdoc for the notes to kind of help the teachers follow along, and I do find ways that I can offer interactive participation during the professional development.

Mr. O shared that interactive activities are used as engagement tools. "During in-person PD, I do a lot with the basics of like, think-pair-share, using graphic organizers, using small group instruction, using stations, anything that I feel like can be made relevant to the material that's being presented." He also explained that while he's presenting, he "looks for visual cues from the audience. Do people seem restless? Do they seem engaged? And I can kind of see if what I am presenting is truly relevant to them."

During the analysis of the hyperdoc and slide deck that was provided by Mr. O, two specific strategies were shared and several resources for information and texts were linked. The hyperdoc included several different sections including common acronyms related to the topic and exceptional children terminology, as well as screenshots that were taken directly from the slide deck. The slide deck consisted of 33 slides for the 1.5 hour-long professional development session. Slides for group norms, session outcomes, and alignment to the teaching standards were present. Much of the content and slide deck was information heavy, and only one collaborative group activity was included. The opening activity was an Anticipation Guide that asked participants to identify at the beginning of the session whether a statement is true or false, and asked them to return at the end of the session to see if they will change their answer.

Figure 5

Mr. O - Anticipation Guide

Definitions, bulleted lists, and charts and images were included. A breakout room scenario activity required participants to determine if the provided scenario would

require a teacher to provide accommodations or modifications. Mr. O referenced this activity in his interview, stating:

So the breakout room activity was specifically chosen to demonstrate some of the best practices around using breakout rooms in the remote learning environment. So that's why I chose that activity so that teachers can hopefully participate in an activity with the structure of what they should put in place when they use that in their virtual classroom.

An additional whole group activity asked teachers to reflect as a group on a final scenario and generate appropriate accommodations and modifications to assist the student with accessing grade level curriculum. The final return to the Anticipation Guide had participants checking their initial answers similar to a pre-and-post assessment, and the last slide of the deck provided an encouraging message regarding teaching in a virtual environment and advertised upcoming professional development events.

Figure 6

Mr. O - Connections Slide
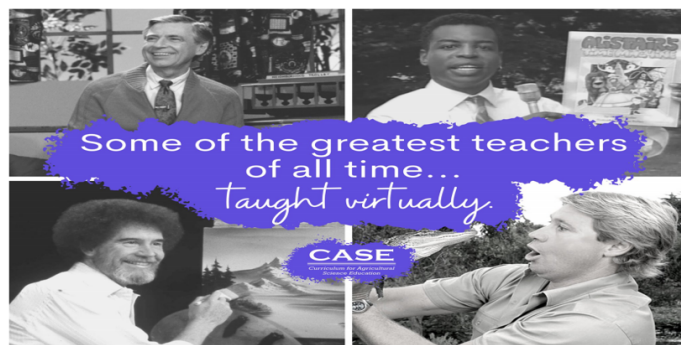
The language used in all planned materials was directive and text heavy with several bulleted lists and definitions. Most slides were titled with a guiding question that the slide content addressed, "What do a 504 Plan and IEP have in common?" and certain phrases or information were bolded, written in red, or underlined for emphasis. Directive phrases like "Keep track of your documentation!" were included, but reflective moments were also present as referenced above via slide titles and a pause in the presentation asking participants to "Identify one key take away so far." The heavy reliance on direct information in the presentation was explained by Mr. O,

> It was definitely information that they needed, that they needed to be aware
> of, especially considering that they had been delivering instruction to students
> for I think, at the time, a little bit of a month and hadn't actually met some of
> the modifications that were mentioned in the professional development. So it
> was definitely something that they needed to hear. A good portion of that
> professional development was kind of a sit-and-get with a hyperdoc for guided
> notes for the participants because a lot of that information was basically like
> key points that they just needed to hear on IEPs and 504s.

Knowing participants' needs and wants was important to Mr. O, as demonstrated in his use of surveys, data collection, and analysis during his planning process. Mr. O not only mentioned a need to know his audience but also recognized his role as a representative of the districts, schools, and principals that hire him to plan and implement PD. Much like the other instructional leaders in the study, Mr. O described session participants as students that had gaps, though his emphasis on learner needs acknowledges adult learning theory and recognizes the experience and readiness to learn

of adult participants. This is also recognized in his planning practice to utilize participant feedback in the planning of future sessions. Describing his plan, Mr. O once again seems to rely on his pedagogical knowledge but recognizes that learner agency is important for his adult participants and collaborative activities and modeling, as well as the documents and resources he provides, aim to encourage a deeper understanding and application of session content. In his planning, Mr. O mentions that participants need to know the content that is shared, but this also demonstrates an assumption that he accurately knows what the gaps and needs are and in turn provides the exact information that is necessary to impact participant practice. This expert approach echoes the other instructional leaders' approach as a vessel of knowledge that deposits content into learners, though his beliefs do recognize the need for the process to be transactional between learner and leader.

Implementation

When asked about how he approaches presenting professional development as a facilitator, Mr. O said,

> I gauge whether they're with me, whether they're engaged, and I have the data
> to show that this would be relevant to them. So then how do you then decide,
> you know, what you're going to do in the moment? Like what's informing or
> what considerations are you giving to then share certain things and not others?

He went on to explain that implementation of professional development is dependent on the learners: "If I have an audience that has participated vocally, maybe the activity can be eliminated. If the group has not been vocal, out loud as a whole group, but maybe they are actively participating in small group decisions, then perhaps the

strategy should be what stays." This practice was not demonstrated in the slide deck or observation; instead, it seemed the professional development was planned and delivered as intended with no adjustments for audience individuality. He further expanded on how these adjustments are sometimes made in the moment, "I think that kind of plays into just being able to try to adjust looking at the group and just trying to determine what body language says. Are they still making eye contact? And they started working on other items? Do they seem restless? It's kind of difficult. To be honest, I think it's something that we kind of learn, so it's kinda a learn as we go atmosphere sometimes."

When asked about how he plans and manages engagement during a professional development, Mr. O explained,

> If there's a particular area in the presentation where the participation level seems to drop, I'll kind of pull in some of the expertise of those teachers who are there that I've worked with. I use them sort of as an example of, you know, something that you can possibly do in your classroom to meet whatever objective it is that we're dealing with.

Questioning during the observation was utilized by Mr. O mostly in the areas of transition questioning, such as, "Does anyone have any questions about the two before we move into what is the difference between a modification and an accommodation?" and questioning for understanding, such as, "Any questions about accommodations? And modifications? Does anyone have any questions because we're getting ready to do an activity where you're going to talk through scenarios to determine if the scenario requires an accommodation, or if it requires a modification?" Other questions

asked teachers to reflect and make connections between the content and their own daily practice, such as, "Do you know who is the contact person for each document? Do you have a paper copy of these documents for those students?" Mr. O referenced this, explaining that "some of the questions that I asked were built to provide clarity [and] to also provide additional access to the materials in their own schools."

Mr. O further explained his use of questioning in relation to encouraging engagement and comprehension, stating:

> I'll usually often try to, you know, ask another guided question to get them where they needed to be. Or if I see where there's some lag or it seems like maybe participation is starting to slow, I try to throw in another question that maybe is not on the slide to hopefully bring everyone back.

Mr. O also explained that questioning during implementation of the professional development was used as an instructional support for learners. He explained he used questioning to "just kind of hopefully open them up to really starting to think about what the topic was trying to, I guess, drill home." He also explained that he uses questioning to support teacher self-identification of resources. "I try to show them where they can go for additional help, additional resources, once the professional development is over. That is what that question was used for. Other questions throughout the session were just once again [used] to basically kind of dig in and get teachers to like access the material in a different way [and] to have them think about what we were talking about."

Also present during Mr. O's implementation of professional development was the sharing of personal anecdotes and teacher references that illustrated the content and concepts presented. Mr. O explained,

> Oftentimes, especially when you're working with beginning teachers or any teacher in general, sometimes when you're a new person presenting professional development, presenting information to them, they oftentimes I guess, kind of question like, who you are? Where you from? Are you even someone who's actually taught? Are you someone who's actually familiar with the information that you're actually giving them? And so in that instance, since I had a very personal connection to the 504s and how they had worked, I was able to kind of bridge the gap from instructor to teacher. I was able to share how a family member of someone who had gone through a similar situation and needed one of those forms to basically complete their schooling used it. So that's why I chose to do the personal example at that time because hopefully, I felt like it would help show the participants that I not only was a teacher who understood them, but I was also someone who had personally experienced what those have to offer for students in the past.

Mr. O also explained his shared experience also acts as a technique to engage learners and something that can be used to aid motivation. "What motivates teachers to learn is, again, how is the facilitator tying this back to who I am and what I need at the end of the day?" He also expressed that teachers need to see themselves in the learning because he "think[s] that empowers teachers and encourages them to participate, the

fact that you're acknowledging who they are, and what they are doing every day in the classroom."

Engagement and active participation in the learning are important to Mr. O, and this is demonstrated in his desire for flexibility in presentation in a learning session. In addition, he relied on questioning not only for engagement but also as a way for participants to make connections between content and their own daily practice, which recognized adult learning theory assumptions. That said, Mr. O did not mention the use of question creation from the participants and articulated the asking of questions as a way to support and guide learners rather than having them generate their own inquiries. Personal anecdotes and shared experiences were also something present in the implementation of Mr. O's PD and another element of flexibility that was demonstrated during the learning session. These moments, while aiming to make the learning more personal, were one-sided and shared only by the instructional leader, further demonstrating the leader as the expert guiding participant outcomes and future implementation.

Analysis

Mr. O's ideas and theories impacted his planning and implementation of professional development in that he views an instructional leader as a facilitator for teacher growth, and he believes an instructional leader identifies and fixes gaps in teacher practice. Much like the other participants, Mr. O believes an instructional leader is meant to guide teachers to more effective practice by identifying what is needed and fixing it, all the while recognizing teachers as participants in learning that have their own needs and desires. Though this recognition of agency over learning

was cited as important by all the participants, the idea of an instructional leader as a practitioner repair person reinforces the idea that as a facilitator of learning, an instructional leader must share their knowledge to increase teacher effectiveness.

He also feels an instructional leader should rely heavily on data and knowledge about participants and their needs to plan and present relevant professional development. This data also is used to drive the identification of "areas of repairs" in order to plan learning sessions. He finds his practice driven by district and school initiatives, which impacts session content, activities, and shared strategies, and he focuses on questioning and the sharing of anecdotes connected to content to promote participant engagement. Mr. O's ideas and theories informed his planning and implementation of the professional development in that questioning and assessing teacher comprehension were important to his practice. In addition, his approach planning and implementation recognizes space for modeling and demonstrations of mastery. This apprenticeship model of coaching continues a "repair person" approach in that the instructional leader's role in professional development is to lead participants to learning and guide their thinking based on their assessment of learner needs. Additionally, Mr. O incorporates strategies and resources for teachers to gain a greater depth of understanding. Finally, Mr. O utilizes shared teacher and facilitator experiences to make professional development more engaging and connected for participants. Table 6 summarizes the data from this case.

Table 6

Mr. O

What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?	*How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?*
Believes an instructional leader identifies and fixes gaps in teacher practice	Questioning and assessing teacher comprehension are present
Data and knowledge about participants and the needs are essential to professional development planning and implementation	Provides space for modeling and demonstrations of mastery
District and school initiatives impact session content, activities, and shared strategies	Incorporates strategies and resources for teacher to gain greater depth of understanding
Focuses on questioning and sharing needed information for engagement	Shared teacher and facilitator experiences make professional development more engaging and connected for participants

Summary of Within-Case Analysis

This section summaries the findings of the within case analysis. Table 7

illustrates the major themes found in each case and the remainder of this section

reviews the themes and findings of the within-case analysis.

Table 7

Within-Case Findings

Instructional Leader	Themes
Miss M	1. Knowledge of professional development participants allows for flexibility in the moment to address perceived learner needs and encourages purposeful questioning

	2. Sharing teacher and facilitator experiences and responding to teachable moments make professional development more engaging and connected for participants
Ms. I	1. Research-based practices and collaboration promotes engagement and critical thinking opportunities that can be supported via questioning 2. Shared experiences and resources make professional development more engaging, connected, and encourages deeper understanding for participants
Mr. O	1. Data and knowledge about participants and their needs are essential for engagement and questioning 2. Modeling, demonstrations of mastery and shared teacher and facilitator experiences make professional development more engaging and connected for participants

In the first case study, Miss M believed that an instructional leader was a facilitator who utilizes flexibility to meet participant needs. The themes for Miss M were: a) Participant Knowledge: understanding professional development participants allows for flexibility in the moment to address perceived learner needs and encourages purposeful questioning; and b) Teachable Moments: sharing teacher and facilitator experiences and responding to teachable moments make professional development more engaging and connected for participants.

In the second case study, Ms. I encouraged critical thinking via research-based practices that address teacher need and provides resources for ownership of learning. Her belief that instructional leaders elevate the teaching profession is evident in her use of research-based strategies and resources. The themes for Ms. I were a) Guided support: research-based practices and collaboration promotes engagement and critical thinking opportunities that can be supported via questioning; and b) Connections: shared experiences and resources make professional development more engaging, connected, and encourages deeper understanding for participants.

The final case study, Mr. O, focused on modeling, demonstrations, data, and knowledge about participants and their needs to plan and implement professional development. The themes for Mr. O were a) Participant Knowledge: data and knowledge about participants and their needs are essential for engagement and questioning; and b) Connections: modeling, demonstrations of mastery and shared teacher and facilitator experiences make professional development more engaging and connected for participants.

In summary, this section reviewed the within case analysis, discussed the three cases and attempted to answer the first two research questions:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

The data illustrated some similar themes across cases, but also demonstrated that instructional leaders perceived teacher need and personal beliefs impact their professional development planning and implementation. The next section is an analysis across the cases that attempts to answer the third and final research question.

Across-Case Analysis

The themes that emerged from the study data when looking across-cases include: Participant Knowledge, Connections, and Teachable Moments. These themes were present across all instructional leader beliefs, planning, and practice, grounded in the within-case data, and situated across the cases. To answer the first research question, "What ideas and theories do instructional leaders say they use to plan and implement

professional development for the teachers with whom they work?" interviews, and professional development documents were analyzed. The ideas and theories that the instructional coaches said they use to plan and implement professional development were connected to their vision of what an instructional leader does and what their adult learner participants need. Ultimately, Participant Knowledge was a theme that all the case studies emphasized as essential to their work. Additionally, all participants made reference to the need to know their audience so they can best meet their learner needs.

To answer Research Question Two, "How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?" interviews, observations, and document analysis were utilized. A major theme that emerged from this question was Connections, specifically how shared experiences, resources, and modeling makes professional development more engaging and connected for participants and encourages a deeper understanding of the learners in a professional development. Another theme, Teachable Moments, was present across cases in that all instructional leaders highlighted the importance of using questioning and ongoing check-ins to ensure learner engagement and content relevance.

To answer the third question, "In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?" Knowles's six assumptions of adult learning will be applied across cases. These themes include self-direction, enhanced experience, readiness to learn, problem-centered, internal motivation, and need to know (Blondy, 2007; Knowles, 1990; Merriam, 2001; TEAL, 2011). To answer this question, participant interviews, observations, and submitted documents were analyzed through an adult learning lens.

Self-Direction

According to Knowles (1975), self-directed learning is a "process in which individuals take the initiative without the help of others" to plan, accomplish, and evaluate their own learning experiences (TEAL, 2011). As such, self-directed adult learners need to be actively involved in the decisions that affect them and experience a collaborative environment that encourages learner input (Blondy, 2007). While none of the cases planned or illustrated professional development that encouraged teachers to take initiative to seek out their own professional development, almost all the cases included some elements of self-direction for adult learners. From evaluations and feedback opportunities that were utilized for future planning to hyperdocs that contained additional resources for teacher exploration, the theme of self-direction for adult learners was loosely present in all the instructional leaders' practice. In her reflections on teacher participants who were alternatively trained, Miss M explained, "What I found is that they are self-directed learners, that, whenever there's a need, they will go and seek information for themselves for the most part. A lot of them are in changing careers and shifting careers, and they're used to being independent and doing things on their own." Additionally, she explained the need for practitioners to recognize this adult learning reality, stating, "I found that the adult learners, especially those who are transitioning from one career to the next, are very independent in their thinking and they will do and seek and find information for themselves."

While all participants incorporated some sort of recognition of self-direction, there were also non-examples that contrasted with this adult learning need. All participants vocalized and demonstrated some form of directive instruction or planning

that recognized them as the expert and their experience as a compass for perceived teacher need. Ms. I explained,

> I see that they have needs that they may not see. An example would be last year, I had a social studies teacher who did not see the need to not freely express her biases when teaching. She felt it was very important that her students knew where she stood on issues about you know, current culture. And so she had a very definite solid need, that as an experienced educator I knew that she did not need to be sharing that information with students. And in fact, I thought it was detrimental to the students.

Mr. O also demonstrated this when reflecting on how he selected content for and implemented his professional development session. He stated:

> It was definitely information that they needed, that they needed to be aware of, especially considering that they had been delivering instruction to students for I think, at the time, a little bit of a month and hadn't actually met some of the modifications that were mentioned in the professional development. So it was definitely something that they needed to hear.

Overall, the use of self-directed learning was minimal in that the instructional leaders aimed to support teacher growth and development through their own experience and expert vision. While consideration about participant agency over learning was frequently expressed, it was not necessarily implemented fully, as participants were not encouraged to explore content during the learning sessions but rather practice and apply what was shared.

Enhanced Experience

Recognition of adult learners' life experiences can impact their disposition towards learning opportunities and change in their own practice (Altan & Lane, 2018). In order for adult learners to make sense of the unknown, links to the known are important and newly gained knowledge is more impactful when it is assimilated and interwoven with what is already mastered, experienced, or part of current practice (Terehoff, 2002, p. 68). While the assumption of enhanced experience was not explicitly present, it did emerge in instructional leaders' reliance on teacher reflection and in the theme of Connection and use of shared experiences. Mr. O addressed this when he said,

> There were people who probably knew or have known some of this information in the past. And so I tried to structure it in a way that was not beneath them; that it was a way to maybe reenergize the information and bring it back to something different, show some different possibilities to basically show how it may be different from the physical classroom setting to the virtual classroom setting that they were in. I try to make it, you know, more on their level as possible.

Additionally, Miss M confirmed this in her assertion that "I want everybody to feel like they're a part of the professional development that nobody has the opportunity to hide and everybody has an equal voice." That said, all instructional leaders did not plan or implement a specific time during the professional development for participants to "actively recall experiences from their classrooms and [be offered] opportunities to form analogies between new learning and familiar life experiences" (Simmons & Borden, 2015). In fact, many times during the professional development observations, participants were not asked to share their work or vocalize their experiences that connected to

content. While the instructional leaders' beliefs and planning recognized their desire to have a transactional learning occur during professional development, the implementation of the learning sessions were many times "expert driven" and did not necessarily recognize participant voice. Much of the documents and language utilized in professional development sessions was directive and this limited the amount of space given for back-and-forth conversations that recognized participant experience and voice.

Readiness to Learn

When learning is grounded in practical, applicable topics in which teachers can "see" themselves, their readiness and appreciation of the education climate will increase (Beavers, 2009). All participants addressed readiness to learn in their desire to obtain knowledge about participant needs and realities. Mr. O explained this concept, stating,

We have teachers in the audience, or any other, you know, educator in the audience who has been traditionally trained in an educator prep program, [and] they generally are needing a little bit higher level instruction, so they are the ones who you really have to make sure that what you're presenting is engaging for them. And hopefully, it's something, if it's not new, that is a little more rigorous than what they maybe have seen in their past in their university setting. Or it's a little bit more rigorous as to maybe what they have been implementing already in their classroom. The issue arises [when] another larger group of the participants right now in state are lateral entry or residency teachers. These are people with very little experience in education, and so just about all of the information presented is brand new to them. They often need for you to go a little bit slower; they need more of the modeling, and they need a little bit more of a hands-on to

be able to actually see and to feel what it looks like and what it may feel and look like in their classroom...So when you mix these two groups together, you get a an audience that is very diverse.

Furthermore, according to Merriam and Bierema (2014), readiness to learn intersects with "teachable moments" that arise from changes in social roles that create an immediate need or a desire to prepare for future engagements (p. 52). This was another theme that emerged from the case studies. Miss M confirmed this in her observation of the adult learners she instructs. She said, "I'm always doing something to activate their prior knowledge. I need to know what they don't know and what can be some of their barriers to being successful so I can embed those things very organically into professional development, knowing that may not have been in the plan." This idea of flexibility to deviate from plans if the instructional leader deems it necessary or worthwhile demonstrates the idea of the instructional leader as the driving force behind what's essential and important to be recognized. That said, it is clear Miss M is recognizing the adult learning assumption of Need to Know in that she is attempting to focus her guidance on participant gaps in learning. She also attempts to recognize participant realities and address the "barriers to being successful" that can inhibit follow up and implementation of the learning by the participants.

Timing is also an important factor with regard to readiness and the adult learner, as a beginning teacher's learning needs will vary greatly from a veteran teacher's concerns for practice (Gregson & Sturko, 2007). All practitioners mentioned time as an impacting factor to their successful planning and implementation of professional development. From the timing and scheduling of the session to the content selected

during specific parts of the school year, timing was cited as a factor that can negatively impact professional development outcomes by all participants.

The concept of Readiness to Learn was recognized frequently by the instructional leaders as demonstrated in their desire to know their audience, make relevant connections to daily practice, and recognize the experiences that the learners were bringing to the PD sessions. Despite this, the instructional leaders also made the assumption that their judgement calls regarding content, questioning, and shared experiences accurately recognized participants' readiness and appropriately addressed knowledge gaps.

Problem-Centered

Adult learners want educational experiences that are grounded in problem-solving and opportunities to immediately apply the knowledge that has been gained (Merriam & Bierema, 2014). As such, teachers want practitioner-friendly, substantial professional learning opportunities that relate to their practice and allow for instant implementation in their classroom (Gregson & Sturko, 2007). Problem-centered practice was cited by all practitioners and also represented via the activities and questioning instructional leaders selected. Mr. O expressed a need to problem solve and "generally play in any type of activity that is a means to kind of once again, kind of bridge that gap between the professional development and what happens in their classrooms." Additionally, Miss M highlighted during her implementation that she "talked a lot about what are the barriers. And we talk through those barriers collectively, but they always have an opportunity for teachers to talk." She went on to explain that she "want[s] to present an opportunity to teachers who don't get professional development, [an] opportunity to become problem solvers and critical thinkers to reflect on their own practices."

While problem-centered practice was referenced and attempted during the planning and implementation process by instructional leaders, they all relied heavily on a model of expert-apprentice presentation of content, which inhibited the problem-centered practice in that the experts knew the solutions to the problem all along. While modeling, scenarios, and collaborative activities and content exploration helped to alleviate some direct instruction and recognized the need for immediate application of newly gained knowledge, this was an area that instructional leaders struggled with balancing recognition of adult learner participants and ownership of their own leadership roles.

Internal Motivation

Creating a conducive environment in which teachers excel to high levels of learning can only be achieved when internal rewards are present (Woodard, 2007). In order for the teaching practitioner to be fully engaged, the learning experience must be grounded in the learners' ambition to engage in learning opportunities and recognize individual needs (Simmons & Borden, 2015). Internal motivation was an adult learning assumption that was not as evident across cases. While feedback opportunities are offered for teachers to highlight their needs, Ms. I demonstrated the attempts instructional leaders make to incite internal motivation, stating, "I try to discern through the conversations, what the missing pieces are for them, what is not evidence to them? What is not coming easily? And how can I provide them with tools, strategies and resources to meet those needs?" However, a lack of internal motivation may leave many adult learners feeling the learning is forced rather than pursued as an opportunity for improvement. Ms. I explained this reality, "What I hope motivates them is their students. That is my hope.

Unfortunately, I think often what motivates a lot of teachers is the required certificate for the PD. I mean, I'm just being honest."

Mr. O also cited a lack of district internal motivation to support teaching learning as a reality in which instructional leaders operate. Mr. O stated:

I have in the past been asked to give three professional developments revolving around literacy. And I was simply told, we just need three professional elements on this topic. We don't care what you do. And when it's worded like that you feel like, what you're being asked to plan is not something really that the district wants…[and] that the district isn't really concerned, how it comes off, or how it comes across the teachers.

All the instructional leaders expressed an understanding and recognition that internal motivation and agency over learning was essential to impacting future use of PD content and gained knowledge. All the instructional leaders studied expressed intentionality in their planning and implementation around this concept and desired flexibility to adapt their implementation to try and achieve this for participants.

Need to Know

Adult learners must understand the necessity of their learning prior to experiencing the learning itself (Knowles et al., 2005). Additionally, adult learners invest in learning that is perceived to be necessary (Masuda et al., 2013). This concept was demonstrated in the theme of Participant Knowledge. All participants cited a desire to know teacher preferences for content and learning and highlighted wanting to address the needs of the teachers with whom they work. The instructional leaders all cited using information collected during observations that allowed them to see practitioners' needs.

While Mr. O acknowledged that "professional development that is offered to teachers sometimes does not always meet the needs of where they are right then and there in the school setting in their classroom," he recognized that "for the motivation, basically, it's tied into whether or not the topic was something that they were actually interested in [and] that they thought would benefit them that day and moving forward."

That recognition by instructional leaders is essential for meeting adult learner needs; however, the instructional coaches also were unsure that attendees were aware of their instructional needs. Ms. I explained, "I find, especially with the beginning teachers, they don't always know what their needs are," and Miss M reflected that "some teachers get a very false perspective of how they're performing in the classroom. And so because of that, they feel like they don't need to learn anything else." Regardless, almost all of the instructional leaders aimed to plan and implement professional development that encourages teachers to see "why it is important to learn something before they begin a learning activity" (Merriam & Bierema, 2014, p. 55).

The instructional leaders all had a desire to know their audience and actively pursued data to support their knowledge of participants. This not only accurately reflects adult learners' need to know reality but also illustrates instructional leaders' attempts to recognize their learners and the real knowledge, skills, and experiences they carry with them into the learning session. In addition, it demonstrates the practice that instructional leaders engage in during planning and implementing PD sessions in that they must balance what they as the expert feel is needed, desired, and helpful to both participants and the stakeholders that hire them with what the participants themselves feel is necessary for their learning, growth, and current gaps in practice.

In summary, this section reviewed the within-case analysis, discussed the three cases through the assumptions of adult learning, and attempted to answer the final research questions, "In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?" The data illustrated the presence of the tenants of adult learning, but also demonstrated that instructional leaders many times do not fully recognize professional development attendees as adult learners with experience and needs that can be leveraged for deeper learning experiences. The next section provides a summary of the chapter findings.

<div align="center">**Summary**</div>

Interviews with instructional leaders highlighted the ideas and theories instructional leaders use to inform planning and implementation of the professional development. The within-case and across-case analysis for the case studies attempted to answer the research questions "What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?" and "How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?" Additionally, professional development documents and session observations informed the presence of the six assumptions of adult learners and demonstrated evidence of adult learning theory. This collection of data described the ideas and theories that drive the work of instructional leaders and illustrated alignment with current theories of adult learning.

The main themes that emerged from the analysis of the data included: a) Participant Knowledge, b) Connections, and c) Teachable Moments. Descriptions from each participant regarding their ideas and theories related to the six assumptions of adult

learning and their presence in their planning and implementation of professional

development illustrated that adult learning concepts were present in the planned

professional development sessions, though sometimes loose connections were made.

Additionally, the data analysis demonstrated a reality that instructional leaders' ideas and

theories can drive what content is shared with teachers and is based on personal

preference and perceived understanding of teachers' needs. The final chapter will revisit

the findings of the analysis and will discuss implications and recommendations for future

research.

CHAPTER 5: DISCUSSIONS AND IMPLICATIONS

With the field of teaching constantly being impacted by the evolving circumstances of time, environment, student needs, and learning implications, the desire for targeted professional development and "expert" specialized teacher training continues to grow (Darling-Hammond et al., 2017). It is recognized by both policymakers and practitioners that quality professional development is vital to teacher effectiveness and student achievement (Prenger et al.,2017). Yet, despite increased funding to promote opportunities for teacher learning and increase practitioner continuing education, the research estimates that "as many as half of teachers in their tenth year or beyond were rated below "effective" in core instructional practices, such as developing students' critical thinking skills" (TNTP, 2015). In addition, national and state reform efforts focused on increased student achievement for all students and accountability measures to encourage growth (Burke et al.,2012) continue to remain stagnant, if not discouraging. Poor outcomes and student performance remain, especially among certain populations and those living in poverty, despite state interventions and a renewed sense of educational excellence (Beachum, 2018).

Leading the charge for instructional change, educational leaders are tasked with planning, creating, and implementing learning opportunities for teachers that are relevant, impactful, and result in increased practitioner effectiveness (Kimball & Milanowski, 2009). The goal of an instructional leader with regard to teacher educational opportunities is to "move away from occasional professional development...to prioritizing ongoing, intensive, job-embedded support to...improve classroom instruction" (Honig, 2012). That said, various elements, including content, quality of the professional development

offered, and school climate and culture affect the impact of staff development and the likelihood that teacher continuing education leads to positive student outcomes (Dilworth & Imig, 1995, p. 12; Guskey & Sparks, 1991). Additionally, the characteristics of "high quality" professional development and recognition of adult learning theory and the assumptions that distinguish adult learners as grounded in context, place, and process of the learning itself (Merriam, 2001) must be incorporated into staff development if PD is to result in more positive outcomes (Desimone et al., 2002, p. 82).

Research indicates that quality professional development that recognizes teaching practitioners as adult learners can positively impact teacher effectiveness and student achievement (Desimone et al., 2002; DeMonte, 2013; Darling-Hammond et al., 2009; Frampton et al., 2002, Garet et al., 2001; Guskey & Yoon, 2009; Inger, 1995; Sparks, 1994; Wood & Thompson, 1993; Youngs, 2013). In order to promote professional development that results in practitioner and student achievement, more information and research needs to be focused on the ideas, theories, and perspectives of the instructional leaders that are charged with planning and implementing professional development and more investigation must be done to understand how adult learning theory assumptions align with instructional leader beliefs and the PD they create.

The purpose of this qualitative study was to explore professional development from the perspective of instructional leaders such as independent consultants, principals, and instructional coaches to identify if the assumptions of Knowles's (1990) Adult Learning Theory are present in the planning and implementation of continuing education that aims to "change the way teachers teach and how much students learn" (DeMonte, 2013, p. 4). For the purposes of this research study,

professional development is defined by Paechter (1996) as "an activity in which the individual and the group interact to develop better models for practice which preserve the best of professional autonomy while promoting the sort of reflective culture that encourages constructive, cooperative change" (p. 354). Study participants included three instructional leaders with more than 10 years of experience each teaching, leading, and coaching educators and students in traditional K-12 environments. Participants were observed implementing a professional development session and interviewed before and after these observations; additionally, documents from each professional development session were collected and analyzed. The following questions guided this study:

1. What ideas and theories do instructional leaders say they use to plan and implement professional development for the teachers with whom they work?

2. How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

3. In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

In Chapters 1 and 2, the study was described and the need for research in this area was explored; Chapter 3 described the methodology used in the study. In Chapter 4, the context and findings from the data, as well as a within-case analysis for each of the participants, was shared. The chapter concluded with the exploration of the themes that emerged from an across-case analysis. Chapter 5 provides a summary of the data and

includes the conclusions, implications, contributions to the field, and recommendations for future research that emerged as a result of the study.

Findings

This research sought to study the ideas and theories of instructional leaders, present an analysis of this through adult learning theory, and also explore the ways instructional leaders do and do not consider adult learning realities in their practice. Instructional leaders with at least 10 years of experience who were actively planning and implementing professional development for teachers across schools and districts were invited to participate. All instructional leaders chose to participate in the study and participants were interviewed a second time after the researcher observed them leading a professional development session. Upon analysis of the data, several themes emerged: a) Participant Knowledge; b) Connections; and c) Teachable Moments.

Participant Knowledge

The instructional leaders observed in this study all highlighted a desire to know about and understand the needs and realities of professional development participants when planning and implementing professional development. They described this knowledge of participants as essential for making professional development relevant and more effective, as well as allowing for in-the-moment flexibility to address perceived learner needs and utilize purposeful questioning during PD sessions. Throughout their planning, instruction, and implementation process, all the instructional leaders cited that the attendees of the professional development guided their content, questioning, and focus. The data collection methods that were referenced included end of PD surveys that were used as guides for upcoming training, questioning for connections during the PD

sessions, and even pre-assessment surveys for teachers or the school leadership setting up the session prior to planning and implementation. This knowledge many times was then used to plan future training and/or became the foundation for questioning and in-the-moment instructional moves during PD sessions.

Participant knowledge was also evident via the instructional leaders' belief that professional development is only as good as it is relevant and seen as needed by attending participants. Without an understanding of their audience, the instructional leaders felt they could not engage the learners to a high degree and found it a struggle to plan content and instruction that would directly benefit the teacher attendees. This directly correlated to Knowles's Adult Learning Theory that asserts that adult learners must understand the necessity of their learning prior to experiencing the learning itself (Knowles et al., 2005); presenting the value behind the learning will aid adult motivation and receptiveness regarding opportunities to experience new knowledge (Ota et al., 2006). By having knowledge of the participants, both prior to planning and via questioning during implementation, the instructional leaders proposed they were better able to explain the need, importance, and relevance of the session. They felt they were able to offer adult learners the opportunity to "see" themselves in the learning. As a result, the instructional leaders feel they are able to support a perception of value, and teacher-learners demonstrate more positive attitudes and willingness to participate in learning opportunities (Masuda et al., 2013) when knowledge of participants is present.

Participant knowledge also connected with the instructional leaders' belief systems regarding their role in teacher support. All participants felt building relationships and personalization were important and lead to more impactful professional development.

Terminology such as "authentic and usable" was frequently pronounced to describe instructional leader goals and measurements for success. In their interviews, the instructional leaders described professional development as effective according to many measures, but all participants specifically mentioned turn-around, or the ability of a participant to take something from the PD and immediately apply it or implement it with their own students and in their own classroom. This was also demonstrated in the observations of their PD, with instructional leaders using questioning about content connections to current practice or even via the directive language found in their PD materials.

This belief system and the suggested collaborative process of planning and implementation based on participant knowledge with co-creation of knowledge and skills that emerged from the data analysis, recognizes the Knowles's Adult Learning Theory assumption of Readiness to Learn in that the adult scholar wants learning objectives based on their personal needs, interests, and skills (TEAL, 2011) and are most ready to learn when necessity, changing roles, or social context and situations create a need to learn something new (Blondy, 2007). That said, it was clear that the instructional leaders felt that having knowledge about their participants was helpful so they as the expert could access the appropriate knowledge to share. All the leaders relied on their own expert mastery to plan and implement professional development and operated from an expert-apprentice model of learning that recognizes participants but also provides guidance based on the instructional leader's own knowledge and experiences.

In addition, the participants expressed that timing considerations, including both time of day and time of year for sessions, had a direct impact on planning and the success

of a professional development session. Not only did they cite time as being a significant consideration when planning content and asking in-the-moment instructional questions, but participants also highlighted time as having potentially negative consequences on the delivery and impact of the session. Timing is also an important factor with regard to readiness and the adult learner. For example, a beginning teacher's learning needs will vary greatly from a veteran teacher's concerns for practice (Gregson & Sturko, 2007) and a professional development scheduled on a Friday before a long weekend can impact participants' willingness and readiness to learn more negatively than during a scheduled, student-free workday that has been specifically designated for continuing education sessions. Adult learning must be oriented to changing contexts that require new knowledge (Graham, 2017); targeted focus and alignment of professional development with teacher needs, interests, or desires helps to support purposeful learning opportunities that will translate to teacher motivation and change in practice. When learning is grounded in practical, applicable topics in which teachers can "see" themselves, their readiness and appreciation of the education climate will increase (Beavers, 2009).

Connections

In planning and implementing professional development, the concept of connections, specifically building connections into the content during planning, highlighting connections during implementation, and managing connections for session impact, was an important focus for the instructional leaders observed in this study. Connections to perceived teacher needs and the needs of the districts/schools were cited by all the instructional leaders as part of their planning process. In addition, they all expressed a desire to encourage participants to see the connections between the presented

content and daily work, student interactions, and lesson planning. Not only did the instructional leaders demonstrate the belief that connections were an important part of their planning process, but they also attempted to model and encourage these connections for teachers during their implementation of professional development sessions by using shared experiences that emerged in their presentations as personal stories connected to content or stories of other practitioners that reinforced session outcomes. In addition to shared experiences, some questioning was also used to highlight and encourage connections via reflection. These demonstrations of connection were shared as a way to reinforce practitioners' reflection and comprehension, as well as force engagement and a sense of usability for the participants.

The presence of connections as shared experiences, modeling, and demonstrations of content were also attempted by the instructional leaders to make the professional development more engaging and meaningful for participants, as demonstrated through their interviews and the instructional moves they made during their PD implementation. This belief that connections encourage greater mastery and participant motivation is reflected in Knowles's Adult Learning Theory and the concepts of andragogy. The instructional leaders' emphasis on connections illustrates their desire to highlight the "immediate application of knowledge" that corresponds to the definition of adult learners as "motivated to learn by internal rather than external factors" (Knowles, 1968, pp. 202 – 203). Furthermore, the instructional leaders were addressing Knowles's adult learning assumption of Problem Solving. Motivation in an adult scholar emerges when learning perceptions illustrate an immediate application to life or work realities (Gregson & Sturko, 2007; Knowles et al., 2005). Via the planned and implemented connections,

instructional leaders focused session content on practitioner-friendly, substantial professional learning opportunities that relate to their practice and allow for instant implementation in their classroom (Gregson & Sturko, 2007).

This belief system and the suggested process of planning and implementation around connections suggests that instructional leaders are operating from an apprenticeship model of coaching via professional development. This recognizes the Knowles's Adult Learning Theory assumption of Need to Know as well as Problem Solving in that adult learners must understand the necessity of their learning prior to experiencing the learning itself (Knowles et al., 2005); presenting the value behind the learning will aid adult motivation and receptiveness regarding opportunities to experience new knowledge (Ota et al., 2006). In addition, this apprenticeship model of coaching via professional development is aligned with their belief that an instructional leader is a facilitator for teacher growth and thus influences the student experience. Knowles (1984) recognized that learning objectives, and their corresponding explanations regarding reasoning, must be acknowledged for adult learners to stay motivated and engaged (Woodard, 2007). To avoid deficit teaching and also encourage agency over learning, teachers must see the need and implications of the knowledge they are expected to master (McGrath, 2009). The attempts at connections by the instructional leaders aim to encourage participant investment in learning that is perceived to be necessary (Masuda et al., 2013). By using connections, the instructional leaders planned and implemented PD recognizes that the adult learner participants will only be affected by learning that is perceived to be purposeful and practical (Ota et al., 2006).

Teachable Moments

Across cases, the concept of the teachable moment or a moment where the participant moves from receiving knowledge to actively processing and comprehending concepts was cited as a key aspect of professional development implementation and instructional leader practice. The importance of using questioning and ongoing check-ins to ensure learner engagement and content relevance was highlighted by instructional leaders as essential for effective professional development but were also explained as unplanned personal choices. According to Merriam and Bierema (2014), readiness to learn intersects with "teachable moments" that arise from changes in social roles that create an immediate need or a desire to prepare for future engagements (p. 52).

Instructional leaders in the study felt that using purposeful questioning was necessary but that incorporation of in-the-moment questioning not only maximizes participant motivation but also encourages deeper comprehension of session content and applications. Terminology utilized by the instructional leaders such as "activating prior knowledge" and "going deeper… [on things that] are not in the plan…" reinforced this idea and also demonstrated the reality that instructional leaders made subjective choices to identify these teachable moments during session implementation. This idea of flexibility to allow for teachable moments illustrates the impact that an instructional leader can have not only on the learning that is experienced by participants but also on the trajectory of the professional development session and follow up. While questioning was a strategy used to maximize the learning of the teachable moment, instructional leaders also saw it as a way to encourage both their voice and the voice of practitioners to make the learning process more effective, engaging, and relevant.

The desire for flexibility and exposure of teachable moments is a direct reflection of the adult learning assumption of Enhanced Experience. A variety of gained knowledge through life experiences provides adult learners with different meaningful insights from which to draw and encourages backgrounds that contribute to their new learning (Gregson & Sturko, 2007). Teachable moments allow participants to create insight not only from their own experiences but also from the session content and presentation so that newly gained knowledge becomes more impactful as it is assimilated and interwoven with what is already mastered, experienced, or part of current practice (Terehoff, 2002, p. 68). Instructional leaders' use of questioning reinforces this in that it encourages adult learners to "actively recall experiences from their classrooms and offers opportunities to form analogies between new learning and familiar life experiences" (Simmons & Borden, 2015). Furthermore, the desire and practice of instructional leaders to be flexible with the implementation of the professional development plan encourages opportunities for conversations and discussion that may otherwise be stifled by rigid lecture.

   That said, this practice of instructional leaders and their belief system around teachable moment practice can also undermine Knowles's adult learning assumption of Self-Direction. Self-directed adult learners need to be actively involved in the decisions that affect them and experience a collaborative environment that encourages learner input (Blondy, 2007). In their exercising of flexibility and desire for teachable moment exploration, the instructional leaders also demonstrated a deficit model of instruction that makes assumptions about participants' capacity and encourages an ongoing cycle of reliance on external expertise among teachers (Smith, 2017). All the instructional leaders in the study, while upholding a foundational belief that participant realities and

experiences are essential to the planning and implementation of PD sessions, also demonstrate via their need for flexibility the concept of the leader as the "expert" that must drive the instruction and application of session content. While this may be true for some practitioners, especially beginning teachers and those struggling with instructional practice, it also directly contrasts the idea that teachers as self-directed facilitators of knowledge is only permitted via daily lesson planning and implementation of curricula and content (Gregson & Sturko, 2007). Furthermore, it supports the assertion of teachers that many times they are forced into roles that do not necessarily match their needs and desires as professionals and continual learners.

Overall, instructional leaders' use of questioning and flexibility in addition to the importance they place on teachable moments is not necessarily good or bad practice; positive outcomes regarding moments for practitioner voice and mastery processing can result from these ideas. However, this across-case theme does indicate a need for instructional leaders to reflect on their own beliefs to prevent passive disconnection of participants during professional development sessions that could result in a lack of active practitioner change following the adult learning opportunity (Smith, 2017, p. 129). Additionally, planned recognition of teachers' experiences and adherence to the plan with regard to these moments can avoid interactions with instructional leaders within professional development contexts that can cause participants feelings of rejection and minimization of practitioner competency (Terehoff, 2002).

Implications for Practice

A major theme that emerged from the study was the concept of adult learner autonomy and personalized learning. This theme could be beneficial to school leaders,

districts, educational consultants, and those practitioners that support teacher growth and learning through professional development opportunities. Knowledge of participants, especially around the concepts of topic and time of professional development situated within the school year were repeatedly emphasized by instructional leaders. The demand to know, recognize, and highlight participant needs was seen by instructional leaders as essential to increase engagement and plan and implement professional development sessions that were relevant and timely for practitioners. Though the instructional leaders utilized surveys and questioning to gain this information, the data to support the planning and implementation of truly personalized learning experiences that would promote adult learner autonomy and encourage substantial changes in practitioner practice was lacking. Furthermore, instructional leaders recited a mantra of personalized learning without providing truly personalized learning sessions. The study demonstrated a mismatch between instructional leader beliefs and initiatives and their ability to create and adhere to personalized learning that was authentically based in practitioner need and not the perceived needs the leaders felt were important to address.

Based on this juxtaposition of a desire to meet learners needs but a lack of specific, objective knowledge about participants, interested stakeholders should encourage data collection from professional development attendees prior to session planning and implementation. Continuing education sessions should not only be designed and guided by instructional leaders and the school and district leadership who schedule the learning sessions. Instead, PD topics and content should be driven by the participants themselves. In order for the teaching practitioner to be fully engaged, the learning experience must be grounded in the learners' ambition to engage in learning opportunities

and recognize individual needs (Simmons & Borden, 2015). Adult learning theory and Knowles's assumptions of adult learners support this reality. As such, the pursual of more data driven, personalized learning opportunities for teaching practitioners will not only better meet adult learner needs but also encourage instructional leaders to plan professional development that is purposeful in content and implement sessions that result in positively changed behaviors of participants.

An additional theme of storytelling and narrative modeling also was found during data analysis. An extension of the concept of adult learner autonomy and personalized learning, this strategy of approaching learning through narratives that aim to force connections between professional development session content and learner realities was utilized as a workaround to personalized learning. The use of storytelling and narrative modeling attempted to demonstrate concepts and relevance to participants and their daily work. The instructional leaders sought to reconcile their beliefs about effective professional development and the role of instructional leaders with their lack of personalized learning opportunities via planned or unplanned connection moments during the learning session. These moments, while driven by the instructional leader, tended to be authentic and allow for presenter vulnerability and teacher voice to emerge.

Teachers want to be offered learning experiences that present pragmatic knowledge that support problem-solving and more effective practice (O'Neill, 2020, n.p.). As such, recognizing a use for shared knowledge encourages teachers to utilize and implement what was taught in a timelier manner (Petrie & McGee, 2012). If stakeholders are unable to enact the optimal design of personalized learning based on observed and identified trends, an alternative is to design professional development in a way that offers

moments for unique context to individual demonstrations and models of mastery. This narrative approach to instructional storytelling encourages deeper participant comprehension and the likelihood of content implementation after the learning session. Not only can this strategy address a mismatch between school or district intent for professional development content and teacher need based on personal realities, but the implications of this instructional leader move can result in more positive learner outcomes and increased student achievement.

A final theme from the research is the concept of directive learning from the expert versus andragogical learning experiences that recognize adult learner assumptions. When analyzing the data, it was evident that the structure most favored by instructional leaders was a hierarchical presentation of content based on a teacher to student model rather than peer-to-peer learning engagement. All the instructional leaders approached their professional development teaching in hierarchical ways and cited the best practices of organizing learning and teaching towards students, rather than adult learners. This is a problem not only because instructional leaders may be missing opportunities to harness adult learner experiences that could offer peer-to-peer support and concept modeling but also because in order for professional development to be effective and purposeful for teachers as adult learners, specific elements of andragogy and adult learning must be present (Williams, 2005).

To address directive versus andragogical practices of professional development planning and implementation, stakeholders should ensure that instructional leaders and those that are planning and implementing PD have a clear understanding of andragogy and adult learning assumptions. In addition, guidance on how to purposefully incorporate

these elements in professional learning opportunities must occur and PD presenters should be encouraged to consider their own mindset, beliefs, and biases regarding adult learners and their own expert mentality. Not only will this shift help to alleviate deficit thinking with regard to professional development participants, but it may also encourage shared expertise. This transfer of power away from the cycle of reliance on external instructional leaders to plan and implement PD and towards a shared expertise model among teachers can encourage all to engage in work to promote student achievement and effective practice. By doing so, stakeholders are elevating the leadership capacity of all professional development participants and encouraging practitioners to work from and collaborate on their strengths for collective support of the staff/school/district learning as a whole.

Recommendations for Future Research

This study examined the ideas and theories that instructional leaders say they use to plan and implement professional development for the teachers with whom they work; it also explored how these ideas and theories manifest in the planning and implementation of the professional development sessions that instructional leaders create. Additionally, the ways in which the ideas, theories, and practices of instructional leaders align with current theories of adult learning were investigated. An expanded study that includes additional cases or incorporates teacher experiences of the planned and implemented professional development sessions could help to further identify why and how instructional leaders make professional development decisions and determine if those decisions align with the theory of andragogy and adult learner needs. In addition, an

expanded study could yield clarity around how instructional leaders perceive their role with regard to teacher support.

Another future research study could be focused on identifying specific criteria for assessing professional development sessions by expanding the number of instructional leaders studied. Exploring the ideas, theories, and practices of instructional leaders with regard to assessment of professional development sessions and deepening questioning around what makes effective PD may result in a tool that could positively impact the learning experiences of professional development attendees. In addition, this study did not explore the online nature of the professional development implementation due to COVID. While the virtual environment in which the study and professional development took place demonstrated the presence of Knowles's adult learning assumptions, additional evidence regarding their transfer to face-to-face environments would need to be collected. Furthermore, additional comparative research between the virtual implementation of professional development due to pandemic events and the implementation of professional development in the traditional environment could identify similarities and differences in instructional leader planning and implementation of professional learning opportunities.

It must be noted that the virtual adaptations and pandemic environment that was present during the study data collection should be recognized as a variable that impacted some of the participants' practice. For example, since schools were following guidelines for remote teaching, the instructional leaders conducted their PD via virtual conferencing platforms (Zoom) instead of holding face-to-face PD sessions. Attendees were required to log-on to Zoom links, had the option of leaving their cameras on or turning them off, and

had to unmute their microphones to speak. In addition, the instructional leaders translated content and collaborative activities accordingly to fit the virtual environment; for example, handouts were distributed via posted links and presenters navigated technology to be able to see and hear the attendees. While this dynamic is not a limitation because the instructional leaders did not alter their planning and implementation practices from their pre-pandemic routine, the participants did cite Covid as having an impact on attendee engagement and responsiveness during learning sessions. Since the purpose of this study was to focus solely on the instructional leaders, no consideration was given to the attendees or their level of engagement, thus mitigating any limitations.

However, the implications of pandemic presenting were present in subtle ways. For example, participants no longer had the option of circulating around the room during small group discussions and instead had to virtually join breakout rooms to listen and respond to discussion. In addition, the virtual context most likely introduced a different dynamic for whole group conversation and teacher interaction. While this speculative impact on interactions is irrelevant for study purposes since the focus was on the instructional leaders themselves and not the attendees or their engagement, it does provide a level of impact on the study participants' instructional moves and nuances that may or may not have been present in a face-to-face context.

The data analyses and findings are not meant to be broadly applied. Instead, the goal of the study was to examine the ideas and theories of instructional leaders, present an analysis of this through adult learning theory, and also explore the ways instructional leaders do and do not consider adult learning realities in their practice. There are limitations to the research, including the number of instructional leaders that participated

in the study. This study contributed to the field by providing a description of instructional leaders' ideas and theories regarding the planning and implementation of professional development, as well as reviewing whether instructional leaders incorporate Knowles's (1990) Adult Learning Theory in their work.

Summary

The instructional leaders in this study explained and demonstrated their ideas, theories, and beliefs regarding the planning and implementation of professional development. In addition, their beliefs and professional development planning and implementation practices were compared to current adult learning theories to determine if recognition of adult learners was present. Several findings emerged from the study including the need for instructional leaders to have participant knowledge with regard to planning and implementing PD. In addition, it was evident that forming connections between session content and participant realities and highlighting teachable moments were also essential to instructional leader practice. This study identified three areas that are important to consider for education stakeholders that engage in professional development design and implementation: adult learner autonomy and personalized learning, storytelling and narrative modeling, and directive versus. andragogical practices of professional development planning and implementation. These areas should be considered by principals, coaches, instructional leaders, teacher leaders, and educational consultants as they plan, create, and implement professional development learning opportunities for adult learners to help support practitioner change, teacher effectiveness, and student achievement.

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APPENDIX A: CONSENT FORM

Consent to be Part of a Research Study

Title of the Project: *TEACHING THE TEACHERS: A CASE STUDY OF INSTRUCTIONAL LEADER PROFESSIONAL DEVELOPMENT*

Principal Investigator: *Melissa M. Sykes, Graduate Student, UNCC*

Faculty Advisor: *Maryann Mraz, PhD, UNCC*

The purpose of this research study is to explore professional development from the perspective of instructional leaders to identify if the assumptions of Knowles's (1990) Adult Learning Theory are present in the planning and implementation of continuing education. Participation in this research is voluntary. Participants will complete two individual interviews, share planned professional development documents, and be observed during a professional development session. There will be a one-time pre- and post-audio-recorded interview and an observation (via Zoom). This will require a total of approximately 3-4 hours of your time during which you will meet twice virtually to be interviewed and be observed leading a scheduled professional development. Follow-up via email or virtual conferencing will focus on clarification and member checks of transcribed materials. The study in its entirety will be 6 months, but your participation will be less than this, taking approximately 3-4 hours total.

There are no foreseeable risks or discomfort to participants; however, participation in this study is voluntary and can be withdrawn at any time.

If you are interested in learning more about this study, please continue to read below.

You are invited to participate in a research study. Participation in this research study is voluntary. The information provided is to help you decide whether or not to participate. If you have any questions, please ask.

Important Information You Need to Know

The purpose of the study is to identify the ideas and theories that instructional leaders use to plan and implement professional development for teachers. Benefits of the study that can be reasonably expected include a greater understanding of the perceptions of instructional leaders with regard to planning and implementing teacher professional development, and a greater understanding of continuing education for teachers. There are no foreseeable risks or discomfort to participants; however, participation in this study is voluntary and can be withdrawn at any time.

If you choose to participate you will complete interviews twice. Once during an initial interview to understand your theories and perspectives on planning and implementing professional development and a second time, after submitting related presentation documents and being observed implementing professional development. Interviews and documents will take place and be submitted virtually.

The researcher will attend a scheduled professional development to observe the instructional leader presenting; due to Covid19, the researcher will join via a virtual conferencing tool like Zoom. During the observation, the researcher will only be attending as a participant and observing and collecting data on the instructional leader presenting. In addition, participants will share notes and professional development session materials that were created and presented to teachers. Your total time commitment if you participate in this study will be 45 minutes to 60 minutes for each interview and the length of time the scheduled professional development is that you will create and implement. The total approximate time for study participation is 3-4 hours.

The researcher will also collect information such as your email address and signature for consent. Your email address will not be shared with anyone other than the principal investigator. To protect your privacy (identity), a pseudonym will be used. While the study is active, all data will be stored in a password-protected Google folder that can only be accessed by the primary researcher.

What benefits might I experience?

There is no direct benefit to individual participants in the study. However, the perspectives of instructional leaders regarding the planning and implementation of professional development for teachers will benefit others by providing insight into instructional leadership and reasoning. Finally, the results of the research will provide insight into how instructional leaders connect their practice to adult learning theory and the assumptions that must be present for adults to engage in learning opportunities.

What risks might I experience?

There are no foreseeable risks or discomfort to participants; however, you may choose to skip interview questions you do not want to answer and are free to end your participation in the study at any time. Ethical and political considerations are minimal in that all participants will be provided with all interview transcripts for review.

How will my information be protected?

I plan to publish the results of this study. To protect participant privacy, I will not include any identifying information. I will protect the confidentiality of the research data by ensuring participant personal information will only be known by the principal investigator for consent purposes. Pseudonyms will be used for publishing purposes. Any personal information will only be collected for the purpose of study and correspondence during data collection. Additionally, only the researcher has access to the research notes, interviews, and submitted documents. Data collected during this study will be kept confidential via a password-protected Google Drive folder. Upon completion of the observation, the researcher will transcribe verbatim what was said and all audio will be

destroyed upon transcription. All consent forms will be kept digitally in a password protected file. Transcription and observation notes will be scanned and saved as digital versions in the private password protected Google drive as well. The data collected will be coded for qualitative analysis and summarized for reporting and then deleted.

Other people may need to see the information I collect about you. Including people who work for UNC Charlotte and other agencies as required by law or allowed by federal regulations.

How will my information be used after the study is over?

Once the study is complete, all identifying information will be deleted from the Google folder in which it is housed. Consent forms will be kept for 3 years in the password protected Google drive per requirements.

After this study is complete, study data may be shared with other researchers for use in other studies or as may be needed as part of publishing our results. The data we share will NOT include information that could identify you.

Will I be paid for taking part in this study?

Participants will not receive compensation for agreeing to be part of the study.

What are the costs of taking part in this study?

No costs will be incurred by participating in this study.

Who can profit from this study?

There are no known conflicts of interests.

What other choices do I have if I don't take part in this study?

There may be other ways to reflect on your professional practice if you choose not to be in this research.

What are my rights if I take part in this study?

It is up to you to decide to be in this research study. Participating in this study is voluntary. Even if you decide to be part of the study now, you may change your mind and stop at any time. You do not have to answer any questions you do not want to answer. Participant data will be destroyed for those that choose to withdraw from the study.

Who can answer my questions about this study and my rights as a participant?

For questions about this research, you may contact Melissa Sykes, mmsykes@uncc.edu, 704-315-8730. Dr. Maryann Mraz, the dissertation study supervisor, can also be reached via email at memraz@uncc.edu.

If you have questions about your rights as a research participant, or wish to obtain information, ask questions, or discuss any concerns about this study with someone other

than the researcher(s), please contact the Office of Research Protections and Integrity at 704-687-1871 or uncc-irb@uncc.edu.

Consent to Participate

Participants will be sent a PDF of all signed documents via email for their records or may print a copy of the document for their records.

By signing this document, you are agreeing to be in this study. Make sure you understand what the study is about before you sign. You will receive a copy of this document for your records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

I understand what the study is about and my questions so far have been answered. I agree to take part in this study.

_____

Name (PRINT)

_____

Signature   *Date*

APPENDIX B: PARTICIPANT INTERVIEW PROTOCOL - INITIAL INTERVIEW

Participant: _____

Date: _____

Beginning Time: _____ Ending Time: _____

Location: _____

Introduction:
Thank you for taking time to answer my questions regarding your ideas and theories on planning and implementing professional development for the teachers with which you work. My name is Melissa Sykes, and I'm conducting research for my dissertation study. I very much appreciate your time and willingness to participate. To ensure I capture everything you say accurately, this interview will be recorded.

I am interested in hearing about your ideas, theories, and experiences on the planning and implementation of professional development for teachers. This interview is semi-structured, so if you would like to provide an example or follow-up on a question, please feel free to do so. There are no right or wrong answers, and all input is welcome. The interview will last about 45-60 minutes. If you need to leave the interview for any reason, please let me know and feel free to do so. Let's begin by discussing your background as an instructional leader.

Interview Question	Research Question Addressed
Tell me your name, position, and the work that you do with teachers. How long have you been an educator and instructional leader? What led you to your current position supporting instructional practice and promoting growth? Probe: How do you define your work as an instructional leader?	Background
Define your role with regard to planning professional development.	Question 1: What ideas and theories do instructional leaders say they use to plan and implement

What information do you like to have when planning and implementing professional development? How do you make decisions regarding professional development content and activities? What methods do you use most often in your professional development (lecture, handouts, etc.)? What activities do you most often use, and what do you most frequently include when planning and implementing professional development? Probe: What would you say is essential to know when planning and implementing professional development?	professional development for the teachers with whom they work?
What informs your practice when creating professional development sessions? How do you make decisions regarding knowledge, learning, content, and objectives to be shared during a professional development session? What informs your instructional "moves" when implementing professional development? What considerations are given during planning and implementing professional development sessions? Probe: How do you assess your planning and implementation process?	Question 2: How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?
How would you define professional development participants?	Question 3:

How do teacher's experiences impact professional development planning and facilitation? What motivates teachers to learn during professional development sessions? What impacts your planning and implementation of professional development positively? Negatively? Probe: Do teachers serve a role in the planning and implementation of professional development? Probe: Do you utilize participant expertise and experiences in planning and facilitating professional development?	In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

Thank you very much for your time. I will send a copy of the interview transcript via email for your review. If you would like to make any corrections or changes once your review is complete, please let me know. This interview will remain confidential, and your personal information will not be identified via this research or future publications.

APPENDIX C: PARTICIPANT INTERVIEW PROTOCOL - POST OBSERVATION

Participant: _____

Date: _____

Beginning Time: _____ Ending Time: _____

Location: _____

Introduction:
Thank you for taking time to answer my questions regarding your ideas and theories on planning and implementing professional development for the teachers with which you work. As you know, my name is Melissa Sykes, and I'm conducting research for my dissertation study. I very much appreciate your time and willingness to participate. To ensure I capture everything you say accurately, this interview will be recorded.

As a follow-up to our initial conversation and observation, I am interested in hearing about your ideas, theories, and experiences on the planning and implementation of professional development for teachers. This interview is semi-structured, so if you would like to provide an example or follow-up on a question, please feel free to do so. There are no right or wrong answers, and all input is welcome. The interview will last about 45-60 minutes. If you need to leave the interview for any reason, please let me know and feel free to do so. Let's begin by discussing your background as an instructional leader.

Interview Question	Research Question Addressed
How did you feel the professional development went? What was an area you felt went the best during planning and implementation? What was an area you felt did not go well or you would revise for next time? Probe: What are your opinions and reflections on the professional development?	Background
How did you make your decisions regarding the professional development content and activities planned and included in the session?	Question 1: What ideas and theories do instructional leaders say they use to plan and implement

Did the professional development accurately represent the planning that you did? If yes, how so? If no, what changes occurred? Where do you think the planning aligned with the implementation? With the participants/teachers' needs? With the time of year/ school year? Why did you select and share the strategies that were present? Probe: Did you implement your plan and content in a way that aligned with your beliefs and ideas of what the professional development should be/do for participants? Probe: How do you think the teachers felt as far as the alignment to what they see as a need for their learning?	professional development for the teachers with whom they work?
When planning and implementing questioning, how do you make instructional decisions? Are you observing anything in-the-moment during the learning session that guides your impromptu questioning? If so, what? If not, what are you basing your questions on? Explore the purposeful planning process observed in all participant sessions (modeling, demonstration, activity engagement). Do you agree this is your process? Why do you use this process or these elements in your PD planning and implementation? Why did you utilize personal examples during the PD and how did you make those choices regarding what to include? Why did you include the resources that you shared with teachers? Probe: Have participants given you feedback on the planning process you utilize?	Question 2: How do the ideas and theories instructional leaders use inform planning and implementation of the professional development they create?

Probe: Did you plan the personal examples you included in the presentation? If yes, please explain further. If no, please talk me through your decisions regarding the inclusion of the example.	
How did you utilize participant expertise and experiences in your planning and facilitating of the PD? How did you utilize questioning? What was planned with regard to questioning? What was asked in-the-moment? How did you make those decisions? How was participant voice represented? How did you plan for it and allow space for it during the session? Were any considerations given regarding the participants (who they are, what they need, etc.) during the planning and implementing of the professional development? How did your professional development represent or recognize the participants as adult learners? How did it recognize the adult learners' experiences? Probe: What is your goal for participants with regard to the resources shared, activities completed, and the session outcomes? Probe: What role will the participants play in your planning and implementation of future professional development sessions?	Question 3: In what ways do the ideas, theories, and practices of instructional leaders align with current theories of adult learning?

Thank you very much for your time. I will send a copy of the interview transcript via email for your review. If you would like to make any corrections or changes once your review is complete, please let me know. This interview will remain confidential, and your personal information will not be identified via this research or future publications.

APPENDIX D: OBSERVATION FORM

Participant Name:

Date: **Time Observation Began:**   **Time Ended:**

Before the observation begins, write a description about the initial set-up, participants, and interactions prior to the start of the professional development. The focus is on the instructional leader-participant ONLY and collected data will purposefully exclude any session attendee responses or interactions.

Subject of the Observation Session and Additional Information

What Occurs?	**What Is Heard?**
What Is Noticed?	**Reflections and Connections**

- *Time stamp in 15-minute increments*