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Teacher Leadership? Voices of Backbone Teachers in China

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Abstract

This qualitative research investigated the applicability of teacher leadership, a notion mostly grounded in the Western literatures, to the educational settings in China. The current research focused on the Chinese lead teachers, backbone teachers (BTs), their experiences, and perspectives of teacher leadership. As a program designed to increase school capacity, the BT system has left its delivery of the promises largely to the local context. The BTs' boundary expanding into other leadership domains traditionally considered as remote from the core of teaching and learning was at the mercy of the principal's leadership and support.

Keywords

teacher leadership, Mainland China, transcultural application and analysis, backbone teachers, principal leadership

The concept of teacher leadership began to take root in educational reform initiatives in the United States in the 1980s (York-Barr & Duke, 2004), as a result of a recognition of the limitations in the paradigm of treating leadership as solely embedded or associated with administrative positions, predominantly the principal at the building level (Katzenmeyer & Moller, 2009). Currently, teacher leadership is an established

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concept and widely practiced in the United States (Katzenmeyer & Moller, 2009) and is popularized theoretically and attempted in practice in various nations (e.g., Chew & Andrews, 2010; Emira, 2010; Jarvis, 2012; Lai & Cheung, 2015).

In contrast, teacher leadership is a recent development in China. The concept of teacher leadership was first introduced by Hong Kong scholars Xu and Li in 2005. The two noted that teacher leader is not to create another specialized position; rather, it recognizes that all teachers are (or need to be) leaders if we are to have quality education. Although teacher leader was never an official terminology used by educational governing bodies in China, a unique teacher group in Mainland China,[1] the backbone teachers (BTs)-*gu gan jiao shi*-骨干教师, as some Chinese scholars argued, in many ways, fit the descriptions of teacher leaders with formal titles (Jin, 2007; Lu & Chen, 2007). By examining BTs' professional life, scholars explored conceptually the possibility of teacher leadership as part of teacher preparation (Jin, 2007; Zhou & Guo, 2014) and the various aspects of developing BTs as teacher leaders in China such as professional development design, execution, and impact on leadership and instruction (Chen & Lu, 2010; Du & Ye, 2013). However, little is known about how teacher leadership is actually understood and enacted among educators themselves, especially by the BTs themselves. Given that BT development has been a central component in major educational reforms in China since the beginning of the 21st century, it is important to gain firsthand perspectives from those who are the target and agent of such reform efforts.

This research was part of a broader study that investigated the local understanding of teacher leadership at schools in Mainland China. In the broader study, we sought to understand how teacher leadership, as commonly associated with BTs in the Chinese context, was developed, operationalized, enacted, and impacted by educators at schools. We purposely selected two schools in the same district with similar school policies and regulations but contrasting demographic and performance characteristics. While the broader study included the voices from BTs, regular teachers, and administrators, this article focused on BTs, their understandings, and interpretations of teacher leadership. The guiding research questions for the present study included:

- What were the roles of BTs?
- How did BTs perceive their roles?
- How similar/different were BTs' views on their roles related to the mostly Western literature of teacher leadership?

This article is organized as follows. We first review the literature of teacher leadership, focusing on the aspects most relevant to the current study, upon which the perceptions and experiences of BTs were explored and interpreted, and the notion of teacher leadership was contextualized and contested. We then discuss the historical background of BTs and the studies, albeit limited, on BTs in relation to teacher leadership. We next describe the research methodology employed in the broader study from which data were drawn for analysis involved in the current research. Lastly,

we present our findings, followed by discussions and implications for future research and policy.

Literature Review of Teacher Leadership With Selected Foci

In the past few decades, the notion and practice of teacher leadership have gained momentum for it is believed that teacher professionals have specialist expertise that needs to be harnessed for better decision-making and classroom practice and that developing teacher leaders expands the leadership pool and enhances leadership capacity (Bush, 2015, p. 671). The concept of teacher leadership has not been clearly or consistently defined (Wenner & Campbell, 2017; York-Barr & Duke, 2004). The literature is primarily United States based (Wenner & Campbell, 2017; York-Barr & Duke, 2004); research from non-Western contexts, Asian societies in particular, is limited. Despite the inconsistency in how researchers in the field defined teacher leadership, Wenner and Campbell (2017) noted that the various definitions shared five common themes: (1) teacher leadership goes beyond the classroom walls, (2) teacher leaders should support professional learning in their schools, (3) teacher leaders should be involved in policy and/or decision-making at some level, (4) the ultimate goal of teacher leadership is to improve student learning and success, and (5) teacher leaders work toward improvement and change for the whole school organization (p. 13).

For the purpose of our study, Katzenmeyer and Moller's (2009) definition was used where teacher leadership was defined as "teacher leaders lead within and beyond the classroom; identify with and contribute to a community of teacher learners and leaders; influence others toward improved educational practice; and accept responsibility for achieving the outcomes of their leadership" (p. 6). This definition reflects what teacher leaders could do comprehensively as it represents all the possible arenas teacher leaders *could* exert their leadership and obligations and responsibilities teacher leaders actually *do* in practice. This definition is well aligned with Wenner and Campbell's (2017) five underpinning elements of teacher leadership.

Who Are Teacher Leaders and What Are Their Roles

Teacher leaders can be informal or formal. The informal is also known as the "emergent" with "teachers *choosing* to lead on specific aspects of school practice" (Bush, 2015, p. 671). Teachers with formal positions or titles such as department chairs, master teachers, or mentors "may also be regarded as teacher leaders" (Bush, 2015, p. 671). In other words, assigned roles or positions can provide the legitimacy but not necessarily the influence—one that has to be earned. The literature indicates that teacher leaders tend to be teachers with excellent teaching experience, a clear and well-developed personal philosophy of education (often oriented to achievement and learning), a career stage that permits risk-taking and giving to others, and a personal life stage that supplies time and energy for assuming leadership roles (Katzenmeyer & Moller, 2009). Excellence in teaching entails three interrelated

aspects: expertise—strong pedagogical and subject knowledge, collaboration—working effectively with others, and reflection—on one's own practice and empowerment of oneself and others (Snell & Swanson, 2000). The close association between teaching competency and becoming teacher leaders, as York-Barr and Duke (2004) noted, is best understood as that being successful in classroom settings enables one to gain the respect and trust of colleagues more easily, which is key to leading effectively among one's peers.

Teacher leadership has yet to arrive at a unified definition. Scholars' reviews of 30-plus years of the literature indicate that conceptualizations of teacher leadership to a great extent are based on a variety of roles taken practically and/or ideally by teacher leaders (Wenner & Campbell, 2017; York-Barr & Duke, 2004). Teacher leadership is "collective, task-oriented, organizational" enterprises where leadership as an expectation is extended to all teachers (Smylie, Conley, & Marks, 2002, p. 165). As such, the following discussion of the primary roles of teacher leaders is based on the thesis of role as function and task rather than position or title—in other words, role as action rather than status.

Because leadership practices and possibilities for teachers are numerous and varied contextually, various teacher leader roles have been suggested by scholars (York-Barr & Duke, 2004). Smylie and Denny (1990) viewed teacher leaders' roles as being a resource for other teachers and administrators, planning and leading staff development activities, leading and assisting in the development of curricula and instructional strategies, and serving as a link among teachers and administrator. Others noted that teacher leaders serve as role models for other teachers by facing up new challenges, sharing with others new ways of working, and positively affecting fellow teachers' willingness and capacity to create change for school improvement (Lai & Cheung, 2015). Another useful delineation of roles of teacher leaders came from York-Barr and Duke (2004), where they proposed seven domains of practice, namely, coordination and management, school or district curriculum work, professional development of colleagues, participation in school change or improvement, parent and community involvement, contributions to the profession, and preservice teacher education (p. 266). It is safe to say that the literature supports the versatility in the breadth and depth of engagements that teacher leaders can take on organizationally and professionally.

Conditions Influence Teacher Leadership

The conditions that influence teacher leadership generally relate to three aspects: the personal, professional, and organizational. Having appropriate preparation in content, pedagogy, *and* leadership skills matters (Durias, 2010). The empirical studies on perceptions of teacher leadership by teachers themselves and how such perceptions guided teacher leaders' behaviors have largely been lacking in the literature (Angelle & DeHart, 2011). In their study, Moller, Childs-Bowen, and Scrivner (2001) found that most teachers who took on leadership roles did not see themselves as leaders, and they always equated the term leader/leaders with people holding administrative

positions such as principals. Disparity in perceptions was also found to be related to teachers' professional background such as grade level and educational attainment (Angelle & DeHart, 2011). Other personal characteristics unconducive to teacher leadership include unwillingness or incapability of disrupting traditional hierarchy, reluctance or discomfort of taking the charge, and lack of confidence (Brosky, 2011; Durias, 2010; Muijs & Harris, 2006). Egalitarianism, one of the most prevailing norms in the teaching profession, may deter any teacher from assuming leadership roles, even in a collegial and collaborative school culture (Katzenmeyer & Moller, 2009). In her study, Little (2000) found that teachers readily acknowledged the skills of a hypothetical master teacher but rejected assertive behaviors of these teachers toward colleagues. The hierarchies created within the teaching ranks under the formal role designations can result in conflict and alienation for teachers taking on leadership roles (Darling-Hammond, Bullmaster, & Cobb, 1995).

Organizationally, school culture, roles and relationships, structures, and administrative support are influential factors for teacher leadership development and success. Schools that lack a unified vision (Brooks, Scribner, & Eferakorho, 2004) or are resistant to change overall (Durias, 2010) have slim chance to nurture teacher leadership. Top-down management structures in schools prohibit teacher leadership, for they restrict the autonomy that teachers need to lead, promote centralized rather than shared decision-making, and stifle the formation of collaborative cultures and collective learning in schools (Wenner & Campbell, 2017). The literature consistently points to the administrative support as a paramount factor, if teacher leadership is to be successful (Wenner & Campbell, 2017; York-Barr & Duke, 2004). Principals, in particular, play a larger role in creating and sustaining a school culture, organizational structures, and a supportive system conducive to collaboration, healthy risk-taking, participatory decision-making, and learning in communities that are key to teacher leadership (Brosky, 2011; Little, 2000).

BT Phenomenon in Mainland China

BTs are a unique group of teachers in Mainland China. Historically, the call for developing BTs was a reaction to the lack of qualified teachers under limited resources in the 1960s (Ministry of Education [MoE], 2002a). The plan was suspended as China experienced political and economic instability and then recovery in the following two decades. The development of BTs was reestablished as a priority by the MoE in 1990 and gained its full recognition when a new round of curriculum reform took place in Mainland China emphasizing quality-oriented education-*su zhi jiao yu*-素质教育 and human comprehensive development (MoE, 2002b). The latest national education plan maintained the importance of developing BTs to form an effective and efficient group of instructional leaders (Xinhua News Agency, 2010).

BTs are granted at three ranks—the national, local (including province, city, county), and school level, and the honorable titles associated with the group include instructional leader, renowned teacher, master teacher, and so on (Jin, 2007).

Correspondently, the BT nomination and selection process is tiered where the lower tier provides candidates for the upper tier. The higher the tier is, the more competitive the process is, and subsequently the more prestigious it is. The main criteria for nomination and selection are teachers' expertise and morality assessed by a variety of outcomes such as student achievement, teaching and research performance, and loyalty to the Party, a tacit and nonnegotiable expectation for all civil servants, same to the components standardized in the merit evaluation system for all teachers (Li & Lu, 2009). Although treated by some scholars as a formal title (Jin 2007; Lu & Chen, 2007), BT functions, to a great extent, like an honorary status; teachers do not necessarily receive an increase in pay once recognized as BTs. Schools with a high number of BTs (often also high performing) enjoy a reputation of having excellency in professionalism and performance; the returns from such a reputation precede individual rewards for BT teachers (Wu, 2005). The BT status helps legitimize one's authority among his or her peer colleagues (and parents) without necessarily having an official leadership position and increases one's credibility and professional capital with the principal for support, endorsement, and sponsorship—all can be instrumental for one's personal growth and career development.

Because there are no official specifications on the roles that BTs should take on, scholars in Mainland China have attempted to address the ambiguity by examining their roles in specific contexts of nationwide educational reforms (Fan, 2004) and school-wide initiatives (Lei, 2015). The researchers found that BTs, to a great extent, engaged in roles related to student learning, teaching, and professional learning—roles that have more similarities to than differences from those of regular teachers. Some other scholars, drawing on the Western notions of teacher leadership, examined the conditions and challenges involved in developing leadership in BTs (Chen & Lu, 2010), effectiveness of professional development for BTs in meeting the needed role transformation under the notion of teacher leaders (Lu & Chen, 2008), and impact of BTs on instruction and school improvement (Jin, 2007).

Method

The overall design for the larger study was a qualitative case study (Yin, 2009). We employed purposeful sampling in research site selection and utilized layered units of analysis where each (of the two) school represented an "information-rich case" (Patton, 2002, p. 46) and the three participant groups allowed within and cross case validations and comparisons. Data collection relied on interviews, observations, and artifacts and documents. Pseudonyms were used for the schools, cities, district, and participants in the study.

Sample Selection and Description

Using deviant case sampling (Patton, 2002), two public middle schools in a same school district, the QP District in HA City in Mainland China, were selected, allowing

Table 1. Teacher Quality and Student Performance Data (2012–2013 School Year).

Areas	KM	SY
# of classes	52	22
# of students	3,100	890
# of teachers	200	102
Teachers with bachelor's degrees or higher (%)	100	49
Ratio of BTs (including school level)[a]	90%	20%
Ratio of BTs (beyond school level)[a]	30%	15%
Highest honor BTs received	National level	District level
# of honors BTs received (provincial level or above)	23	0
Unified higher school entrance examination score (student average)	697.36	530.57
District ranking (middle school level)	First	Fourth

Note. KM = KM middle school; SY = SY middle school; BT = backbone teacher.
[a]Because a teacher could receive BT honors at multiple levels. Counting the total number of BTs obscures BT tiered nature. As such, the ratios provide a more appropriate depiction of the BTs at each school.

contextualized understanding of teacher leadership through comparison and contrasting between cases. The difference between KM middle school (abbreviated as KM thereafter) and SY middle school (abbreviated as SY thereafter) was multifaceted (see Table 1). Nevertheless, in addition to being subjected to the same general district context such as policies and procedures, the two schools shared more commonalities as a result of a partnership between the two from 1992 to 1998, mandated by the HA City Education Bureau who attempted to improve schools through pairing up high-performing schools with low-performing schools. Many academic and operational resources, practices, and strategies were shared then between the two schools. Although the partnership had ended years ago, many of the policies and procedures exchanged have remained in effect at both sites.

Ten participants were selected from the two schools, including four BTs, four regular teachers, and two principals. The criteria used to select BT participants were that he or she was a BT teaching Chinese, mathematics, or English and was nominated by the principal as exemplary teacher leader. The contextual and scholarly considerations that led to our approaching school principals for recommendation of BTs included: First, principal leadership plays a key role in the success of teacher leadership development. Different from often vague and seemingly universal statements in policy mandates, how a principal makes sense of what teacher leadership is and what it constitutes and subsequently translates such understanding into his or her practice varies and is nuanced individually and contextualized locally. Using principals' nomination was a way to capture such variations and their influence on teacher leadership. Second, teacher leadership development has been a key component in the recent curriculum reform in China. As such, the term, teacher leadership, is not alien to Chinese school principals, and its implementation has been, at least rhetorically, underway for years in schools

Table 2. Teacher Participant Profiles.

School	Teacher	Name	Gender	Grade	Subject	Years of Teaching	Leadership Role	Highest Honor
KM	BT	Shen	M	8	Math	12	Math Department Chair; SSC Member	City Level
	BT	Gen	F	8	English	23	English Chair for Grade 8; SSC Member	City Level
	RT	Han	F	8	Math	11	None	None
	RT	Hu	F	8	English	4	None	None
SY	BT	Li	F	7	Chinese	10	Deputy Chinese Department Chair; Chinese Chair for Grade 7	District Level
	BT	Wang	F	7	Math	7	Math Chair for Grade 7	District Level
	RT	Ming	M	7	Chinese	6	None	None
	RT	Yang	M	7	Math	7	None	None

Note. BT = backbone teacher; RT = regular teacher; F = female; M = male; SSC member = school supervisory committee member; KM = KM middle school; SY = SY middle school. Typically, the members are experienced teachers appointed by the principal and in charge of instructional supervision through tasks such as class observations and lesson plan reviews.

under the reform. Last but not least, the principals were the gatekeepers for their schools; the access to the schools and potential teacher participants for conducting the study would not be possible if the endorsement from the principals was absent.

The regular teacher participants were selected if they shared the same office with the recruited BTs and were willing to participate in the study. Two contextual factors played a role in establishing such criteria. First, Chinese, mathematics, and English are the core subjects tested in the Unified High School Entrance Examination. As such, teachers who teach these subjects tend to engage in more curricular and instructional activities and are more likely to assume various leadership roles such as the department chair. Second, teachers in Mainland China have offices separate from classrooms, and at the secondary level, offices are typically divided by subject and grade. The inclusion of regular teachers who shared the same office with the selected BTs as the study participants helped to capture more peer interactions and provide perspectives grounded in similar expectations, procedures, and functions as a result of shared disciplinary, departmental, and relational dynamics. In the end, the principals at both schools did not nominate any BTs from the ninth grade because of the time constraint and demands they faced preparing for the entrance examination-*zhong kao*-中考 for senior secondary schools. Table 2 provides the profiles of the eight teacher participants. All BTs had bachelor's degrees.

Data Collection and Analysis

Multiple data sources were utilized in the broader study. Each participant was interviewed individually, and each of these semistructured interviews (Patton, 2002) lasted approximately 2 hr. All interviews were recorded and then transcribed. Eight formal observations were conducted on structured meetings or activities such as lesson planning led by the BTs, and informal observations were conducted throughout the data collection process; detailed field notes were written. Artifacts and documents such as school policies and teacher professional development plans were collected to strengthen our understanding of the school context and further substantiate our interpretation and analysis of our participants' experiences. Researcher reflective memos were maintained throughout the fieldwork and analysis process to help identify and track themes over time and to provide another source of evidence for triangulation.

For the purpose of this article, the first two data sources related to BTs were used. The constant comparative method modeled after Strauss and Corbin's (1998) grounded theory approach was used for within-school and across-school analyses. With the research purpose being the guiding framework, codes were generated to develop categories, patterns, and themes. Reflective memos were used for the investigation and revision of emergent categories and themes. We were aware that separating data by groups (i.e., BTs, regular teachers, and principals) could be artificial given one's perceptions and re/actions are products of interaction and in relation to others. However, given the focus of this study, using more targeted data on BTs made better sense in addressing our research questions. In reporting findings, there were places where referring to other groups' data was not only unavoidable but also essential to the illustration of the primary BT data and the discussions and/or arguments put forth, such as with the discussion and analysis on formal observational data. In these occasions, we did include the other data as needed.

Findings

Roles of BTs: Lopsided and Contextualized

Our BT participants were visible in their respective schools, and their engagement with the functions or tasks related to curriculum and instruction was evident. The BTs were responsible for supervising teachers' instructions, reviewing lesson plans, studying the textbooks and test materials, learning new curriculum guidelines, communicating to and translating for fellow teachers the new policies and reforms, planning students' extracurricular activities and school-based initiatives, and organizing professional development, echoing the functions of teacher leaders noted in the literature regarding instructional and pedagogical betterment and staff development (Smylie & Denny 1990; York-Barr & Duke 2004).

The designated roles such as department chairs, according to our BT participants, made their inserting themselves in helping and supporting other teachers in areas related to curriculum and instruction "justifiable." Such claims were supported by our

observational data. Take classroom observation—often a sensitive area suggested by the Western literature of teacher leadership—for example, our BT participants conducted them regularly with their colleagues; it was considered as a "normal" function of BTs by the BT participants themselves, the regular teacher participants, and the principals at both schools. The consensus could be a manifestation of BTs' legitimate and expert power (French & Raven, 1959). Along with the centralized structures are the norms of collectivism, elitism, and hierarchism permeating every sector of the Chinese society. The value placed on elite and hierarchical management has enabled the legitimacy of ranks with different tiers of titles based on professional expertise in every field including education (Ding, 2004). Formal titles like department chair, though a nonadministrative designation, granted our BT participants entry into certain administrative domains if they were regarded as closely related to instruction. Nevertheless, the scope and depth of their engagement in these domains were dependent on the school culture and the principal's support where the latter played a major role in creating and continuously shaping the former, as noted in the literature of teacher leadership (Brosky, 2011). We will return in later sections to further discuss the disparities in BTs' participation in decision-making between the two schools as a result of differences in school culture and administrative support.

Further, grounded in a process that has emphasized heavily, if not solely, on one's high levels of content subject and pedagogical expertise, the BT system signals to the school community that who are the instructional experts. It was no surprise that the regular teacher participants in the study had no problem regarding the BT participants in their respective schools as instructional experts. The BT participants were referred by their teacher colleague participants as "the first person to turn for help with instruction" and "an encyclopedia for teaching," to name a few. There was indication that the BTs' expertise allowed them to garner certain referent power (French & Raven, 1959) as they were viewed as role models by some of their colleagues. An exemplary observation was from KM. Two 8th-grade English teachers disagreed on each other's teaching strategy for a less plan during a planning meeting. Afterward, both consulted with Ms. Gen, the BT, and ended up with working together and creating a strategy combined the strengths of both strategies the teachers previously chose. "No one expects us to use the same teaching strategies for our lessons; I would have been fine using whatever I chose." one of the teachers said, "But I, and my colleague, felt that we needed someone who could see what we could not see, those blind spots, because we know how much Ms. Gen knows and we don't." Nevertheless, the strengths of the BTs' expert and referent power in influencing their colleagues varied, as Jarvis (2012, p. 484) noted in his study of subject department chairs, the BTs had "consensual" rather than "essential" power (e.g., coercive power) which required "participation and commitment from followers to be effective"—elements dependent on school culture and administrative support.

The literature noted that teachers' participation in organizational decision-making is key to teacher leadership (Wenner & Campbell, 2017). Our BTs were involved in many decision-makings; nonetheless, the type of decisions and how they

participated differed between the two schools. At KM, BTs were the "bucket stopper" for various decisions traditionally considered as the principal's jurisdiction, such as staff development plans for the department, nomination of teacher candidates for teaching competitions, and budgeting for community engagement events. In contrast, the BTs at SY, mostly treaded within the domain of instruction; their autonomy in making decisions at the school level was limited, particularly if these were personnel- or money-related decisions. Several factors could contribute to the disparity. First, as noted in Du and Ye's (2013) study of BTs and other studies of teacher leaders (Brosky, 2011; Little, 2000), the principal's support was a key factor. Mr. Zhu, at his eighth year as the principal of KM, was a veteran of 20 years in education and well respected by his staff, students, and parents. Mr. Shen commented, "He [the principal] trusts me enough to let me try new things; I think he understands that I will make some mistakes before I get better and do really well." At SY, Mr. Xu was at his fourth year as the principal and had "a tight grip on things going in the school," according to the two BT participants from SY. "I don't think he trusts me or others to the point that he thinks we can do our jobs independently and well," Ms. Li said. Although it was not directly observable from our data that Mr. Xu's "tight grip" was related to his short tenure at the school, it was evident that he was concerned and did not feel "comfortable not seeing things through" because of the school's consecutive low student performances over the years and the overall low credential level of the staff. "Teachers are good, I mean, they tried, but they need help. Their ways have not been working." Mr. Xu noted, "The district, parents, … people are watching us. I have to make sure that things get done as they are supposed to." Like researchers noted high teaching competency as a key quality for teacher leaders (Katzenmeyer & Moller, 2009), the perceived lack of such capacity in most of his teaching staff, together with intensified scrutiny resulted from the external accountability, could limit Mr. Xu's inclination to greater involvement of teachers (BTs included) in decision-making.

Second, as the top performing middle school within the district, KM enjoyed an abundance of sociopolitical and financial resources. For example, many students at KM were from families with members holding key positions at local governmental agencies including the City Education Bureau. Mr. Zhu, the principal, sent his BTs to attend professional developments organized by highly regarded educators and to visit and observe teachers in other high-performing schools outside the district, to name a few. The school culture embraced continuous learning, collaboration, and participatory decision-making conditions noted in the literature as critical for the success of teacher leadership (York-Barr & Duke, 2004). In contrast, the enrollment at SY continued to decrease; the staff turnover, though not the worst within the district, became worse in recent years. There were limited resources available for external professional development opportunities, community events, and other initiatives. "Everyone seems to fight his or her own battles alone." Ms. Wang noted, "Most people have no interest in learning new knowledge and skills or cooperating." The low morale is a result of lack of autonomy and a unified vision, as other scholars have noted (Brooks et al., 2004), restricting the chance of developing a community for

continuous learning and collective leading fundamental to teacher leadership (Chew & Andrews, 2010).

The last factor relates to the personal characteristic differences. The two BTs at KM were confident and proud (not boastful) about themselves being viewed as an "instructional expert" by their colleagues. "It is an honor to know that my colleagues look up to me, and I take that very seriously." Mr. Shen shared, "I think they respect that I don't sleep over my past wins, and I am willing to try new things and work hard to be better at it [*sic*]." In contrast, like the teacher leaders in Durias (2010) study, Ms. Wang, one of the two BTs at SY, was not confident that she had "enough expertise" to make decisions "fully independently." "I've only taught 6 years." She noted, "It really doesn't mean much, a district-level award. Some veteran teachers who do not have that probably are just not interested." Although she was readily to support and help when asked, she was vigilant about not "overstepping" colleagues' boundaries. Both SY BTs, more or less, believed that "things have always been like this" that the principal "makes the calls" and department chairs "execute," and they "really are not in a position to change that." We do not suggest that the BTs' personal traits are isolated factors. Rather, we stress the BTs' characteristics had shaped and were shaped by professional and organizational factors such as the school culture and relationship with the principal—interactively, all had influenced the BTs' participation in decision-making.

BTs' Perceptions of Themselves as Teacher Leaders

There are two Chinese verbatim translations of teacher leader: *jiao shi ling xiu*-教师领袖 and *jiao shi ling dao*-教师领导. While the translations on the "teacher" part have no ambiguity, the translations on the "leader" part are rendered with sociocultural markers: *ling xiu*-领袖 refers to exceptional people with extraordinary charisma and impeccable character, and *ling dao*-领导 refers to people with formal administrative positions. It was not surprising that the BT participants found the first translation unrealistic and the second inaccurate. For instance, Ms. Wang at SY noted,

> I am afraid that there is *very, very few* could ever reach that kind of level … I can only think of *kong zi*-孔子[Confucius], maybe? It [the first translation] is really far beyond the ordinary. I never think about being that kind of saint, and I don't believe that most BTs have the intention to be that kind of leaders.

Mr. Shen at KM also commented, "It [the second translation] makes me uncomfortable. I am just an experienced *teacher* ... ; the principal is the *actual* leader. I am not a school administrator." Confirming Katzenmeyer and Moller (2009)'s conclusion that teachers tend to reject claiming themselves as leaders if they affiliate the term "leader/leaders" with people holding administrative positions, our BTs' rejection of the second translation could be a result of observation of the power structure. As Ms. Gen at KM remarked, "It [*jiao shi ling dao*-教师领导] suggests that I am superior to

my fellows. I don't want to be viewed like that." Ms. Li at SY also noted, "I really don't want my peers have that kind of impression of me; that would make the interaction between my colleagues and me challenging." As scholars noted about subject leaders' restricted power resources and the importance of administrative support for their success in leading (Ghamrawi, 2010; Jarvis, 2012), our BT participants understood that they were not vested with the same power as an administrator and any attempt to suggest a hierarchy within the teaching force as it would have with the second translation could invite conflicts between themselves and colleagues.

Neither did all the BTs fully identify with the description of a teacher leader depicted under Katzenmeyer and Moller's (2009) definition of teacher leadership. "I can see myself doing these things like getting others to better practice, but I think that is part of my responsibility." Mr. Shen at KM said, "A teacher leader has to be *much*, *much* more than that. I just don't think I am there yet." The persons that the BTs referred to as teacher leaders were renowned veteran teachers with "remarkable expertise in content and pedagogy" and who went "far above and beyond" with teaching. For example, Ms. Gen called Mr. Yuan, the teacher leader she named, "the legend at KM." Ms. Gen said, "He had so many awards … and served on almost all the instructional leadership positions in the school." It is possible that the BTs' stress on the exceptionality as a paramount trait of a teacher leader could relate to the traditional "great man" frame of leadership (Northouse, 2014). Although confirming the literature regarding high teaching competency as a key characteristic of teacher leaders (Katzenmeyer & Moller, 2009), our BTs' emphasis of teaching excellence was predominantly on expertise, without necessarily attending to collaboration and reflection, the other two of the three interrelated areas noted by Snell and Swanson (2000). Our BT participants' imbalanced views need to be understood within the context of the BT system. From its initiation, mechanism for identification and assessment of potential candidates, and resources allocation, the BT system operates within the administration teaching division and is a system for teacher quality (how it is defined is contestable) not teacher leadership. The fact that BTs could be put on leadership roles such as department chairs without prior exposure to leadership responsibilities necessarily indicates that leadership, particularly in areas beyond instruction, is peripheral, if not empty, promise under the BT structure.

Like BTs in other studies (Guo, 2006; Lei, 2015), our BT participants believed that they were to serve as role models. They believed that a role model needed to have "solid content and pedagogical knowledge and skills," exhibit "positive and strong work ethics," and behave "in such a way that they are respected and trusted by the principal and their colleagues," so as to promote student success and school growth. They also noted that, though they strived for it, it was on others to judge if they were successful or not. Such perspectives could be resulted from a combination of possibility and necessity as a result of the BT participants' dual identity of being a BT and subject leader. As BTs, our participants to a great extent were regarded by the society in general and the educational community, albeit, loosely defined, as instructional experts. And the BT system, grounded in individual merits as noted above, suggested

to our BT participants that instructional leadership and beyond (though the latter is questionable as we argue) were ultimately an individual enterprise dependent on their individual abilities more than anything else. As such, the possibility was "reasoned." On the other hand, the BTs realized that "role modeling" was needed to perform their job responsibilities as a department chair. For instance, Ms. Gen at KM noted, "You need stay ahead of other teachers, … why would you expect others to listen to you if you don't have much more to offer, [and] you can't do better than what you ask them for?" And yet, the process and end results of "role modeling" were mediated by the contexts in which immediate organizational power and interpersonal relationships either facilitated or inhibited their ability to exert influence. As such, while the KM BTs relinquished the judgment to others out of an understanding that leading in any sense for student and school success was a collective practice, the SY BTs did so out of "uncertainty" and "limited self-efficacy" as a result of lack of empowerment and agency (Jarvis, 2012; Lai & Cheung, 2015).

Conclusion

Our study presented how the BT system as a program designed to increase school capacity has left its delivery of the promises largely to the local context. Without challenging the power hierarchy between teachers and administrators and the teaching-leading division, the BT system, at its best, may improve instructional capacities and encourage instructional leadership, albeit, narrowly defined, in schools. The BTs' boundary expansion into other leadership domains traditionally considered as remote from the core of teaching and learning (e.g., school-wide policy-making) was at the mercy of the principal's leadership and support. Further, with the educational system in Mainland China remaining highly centralized, BTs are unlikely to be expected or encouraged to embrace full actualization of teacher leadership suggested in the literature.

The findings of the study raise further questions about the applicability of the notion of teacher leadership in a still predominantly centralized educational system in Mainland China. For scholars who have argued for teacher leadership in China, the primary thesis remains mostly at the front of teacher development and involvement in educational reforms (Ding, 2004; Lei, 2015). Although helpful, such arguments can be compartmental and include limited-to-none reference to and/or analysis into the field of school principalship, one that plays a critical role in shaping the identification, selection, and development of school administrators—the major organizational element for creating and sustaining teacher leadership as evident in the literature of teacher leadership. By not addressing teacher leadership in tandem with principalship, such advocacy has assumed uncritically that similar to the professions of teaching and school administration in mostly the Western contexts, the two workforces in China share a same pipeline; in other words, from teaching to administration one is progressing through ranks within the same hierarchical professional structure. According to Zheng, Walker, and Chen (2013), despite of some role shifts of a principal packaged

in recent policies, to a great extent and in essence, principal development remains a tightly state controlled enterprise. Only state appointees have access and are funded to attend development programs that are run by selected state-regulated institutions who award state-accredited qualifications (Zheng, Walker, & Chen, 2013). "As such, the state controls the only real pathways between training and appointment. This excludes those aspiring to principalship or those seeking to build the capacity to position themselves for the role in the future" (Zheng et al., 2013, p. 499). Such policies and structures in place have serious implications for the scholarship and practice of teacher leadership in China. The findings of this study confirm the critical role of the principal in teacher leadership. In the same time, the findings reveal a need in the transcultural application of teacher leadership perspective to have a close examination of embedded assumptions of how professions are organized and the macro and micro mechanisms in place to regulate the gateways between the teaching and school administration professions and to do so in a more holistic way.

While egalitarianism is cited in the Western literature of teacher leadership as one of the most prevailing norms in the teaching profession that could discourage teachers to attempt and/or embrace leadership roles (e.g., Darling-Hammond et al., 1995; Katzenmeyer & Moller, 2009; Little, 2000), it did not surface as a primary factor in the BTs' hesitation in identifying with or owing up a teacher–leader identity. Some would argue that such observation is not surprising given the larger context of a centralized system in Mainland China, structurally and ideologically supportive of hierarchism in any social sectors. While in agreement with such explanation, we argue that a propensity to hierarchism does not always produce a consistent manifestation of deference to hierarchical orders or followership. Being part of the larger system, schools host multiple and potentially competing social hierarchical orders; one has yet to be convinced that his or her BT status suffices enough professional capital to "justify" breaching cultural norms such as seniority based on age and/or years of teaching, which both could have no guaranteed association with enhanced quality in teaching and leading. School culture and administrative support are key to regulate these competing social orders and facilitate healthy professionalism. Appropriate translation or creation of new terminology may mitigate the alienation; nevertheless, social and cultural underpinnings related to leadership and identity as well as school contexts need to be investigated holistically to better understand the process of teacher leading.

Our study focused on two middle schools in a medium-size city; replicative studies with different grade levels, locations (e.g., metropolitan, rural), school size, and district type (e.g., highly autonomous such as the schools in the municipalities like Shanghai) may help confirm or disconfirm the findings of the study. Implications for practice point to professional development for BTs focusing more on integration of leading with instructional roles and engaging principals in learning to create flatter structure for shared leadership to encourage and facilitate BTs' leadership. The establishment of a new evaluation system assessing leadership, content knowledge, and pedagogy of BTs may also help promote development on all capacities. To conclude, we hope our study is an effort to respond to Muijs and Harris's (2006) call on

empirical research of teacher leadership in action across various educational systems and contexts. The findings of this study may contribute our current knowledge about the transcultural applicability of teacher leadership theory in non-Western settings and address the gap in teacher leadership literature from the perspectives of the action bearers—teacher leaders (Angelle & DeHart, 2011). The findings may also help awaken BTs' awareness and understanding of teacher leadership and, subsequently, promote an agency in them to better navigate the educational system for leadership development.

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Note

1. Due to the distinctive structural and sociocultural characteristics of the two special administrative regions of China, Hong Kong, and Macau, they in general are not considered as part of Mainland China. The current study examined backbone teacher phenomenon in schools, a phenomenon distinctive to Mainland China under its traditionally and to a great extent contemporarily highly centralized educational system.

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