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Exploring the Insider–Outsider Status of Postgraduate Students in Leading Lesson Study

James Calleja * and Laura Formosa

Faculty of Education, University of Malta, MSD 2080 Msida, Malta; lform01@um.edu.mt
* Correspondence: james.j.calleja@um.edu.mt

Abstract: Lesson study, a collaborative teacher professional development approach, has gained popularity internationally and leading the process with teachers plays a key role in making it sustainable in schools. This paper, which draws on a postgraduate university course for prospective school leaders, examines the dynamic roles in leading lesson study. Drawing on the literature on lesson study and leadership, we analyse how postgraduate students lead lesson study while navigating their status as an insider–outsider. Using a theoretical lens informed by the insider–outsider researcher debate, we propose a classification framework to understand lesson study leaders' statuses. Presenting two case studies, we explore the strategies for the selection of LS participants, communication, and trust-building, as well as the leaders' dilemmas and learning opportunities. Drawing on the findings, we highlight the central role of reflective practice in leading lesson study and offer insights for practitioners. This study sheds light on the nuanced dynamics of leading lesson study and its implications for the preparation of prospective leaders.

Keywords: insider–outsider status; leader education; lesson study; prospective leaders; professional development; reflective practice

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Citation: Calleja, J.; Formosa, L. Exploring the Insider–Outsider Status of Postgraduate Students in Leading Lesson Study. *Trends High. Educ.* **2024**, *3*, 944–959. https://doi.org/10.3390/higheredu3040055

Academic Editor: Eugénia Pedro

Received: 10 August 2024
Revised: 21 October 2024
Accepted: 12 November 2024
Published: 14 November 2024

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1. Introduction

Lesson study (LS) is a collaborative professional development (PD) approach 'in which teachers are led to a deep engagement with the processes of teaching and learning' [1] (p. 95). Originating in Japan in the late 19th century, LS is recognized a robust PD approach that incorporates ongoing collaboration, support, community building, reflection, and research [2]. Implementing LS outside Japan is challenging [3] because of the contextual and cultural differences in teacher education programmes between Japan and other Western countries. Consequently, the successful implementation and sustainability of LS require ongoing investments in educating and developing LS leaders [4].

Like many countries outside Japan, interest in LS is growing rapidly in Malta. Yet, to date, few educators have gained the knowledge, experience, and skills to lead LS [5]. Leading LS primarily involves guiding a small team of teachers, usually no more than six, through a collaborative process of identifying the research problem, planning a lesson with a focus on addressing that problem, teaching, observing the research lesson, reflecting on the outcome of the research lesson, and sharing the knowledge gained with a wider community of educators [6]. In LS, leaders nurture a learning community [7] as they seek to doubt, be critical, and reflect on their own status as team leaders [4].

At the University of Malta, LS is taught within two postgraduate courses—'Lesson Study' (LLI5102) and 'Leading Lesson Study' (LLI5206). For the scope of this paper, we will focus on the data gathered over a seven-month period from two of the nine LLI5206 participants who were learning to lead a lesson study. Taught by the authors of this paper, this five ECTS course is offered to prospective school leaders using a blended practice-based approach. The participants first learn about LS through the course lectures offered at the University of Malta while, at the same time, they lead a lesson study at a school of

their choice. During this course, the participants are supported by the lecturers, who are experienced LS leaders and act as mentors to support the participants as they engage in learning about, implementing, and leading LS.

In this paper, we use the term 'leaders' to refer to those educators 'who lead the activities of a group of teachers by setting agendas and norms for interactions, supporting teachers' exchanges of experiences and sharing new insights, monitoring and moderating discussions, providing input, and enabling teachers to work towards the goals set for the group' [8] (p. 248). The fundamental premise of LS leaders is, hence, to support teachers to build and form a collaborative learning community which affords freedom to experiment and to take ownership of teacher learning [6]. Besides improving teacher practices, the LS leaders' intention is to help teachers come together to develop professional relationships. In search for collaboration, leaders, working alongside teachers, seek to negotiate a common understanding of effective teaching and collaboratively work towards transforming classroom practices [9].

In schools, LS teams can have various set ups that depend on the team composition (e.g., teachers of the same subject and/or grade level) and leader status (insider–outsider). Leaders are more of an insider when they are members of the team and had previously spent an extended period working with and within the team. On the other hand, leaders are considered outsiders when they are non-members of the school and the team and, hence, are complete novices to the practices and actions of the team [10]. The reasons for selecting a leader could be various and specific to each school and/or LS team. In this paper, we focus on the experience of two postgraduate students and pursue this to uncover how they negotiate their insider–outsider status when leading teachers through LS. We critically analyse the status that these leaders take on during the LS process and the impact it has on teachers during the different LS phases.

2. Literature Review

2.1. Leadership in Lesson Study

Effective leadership in LS involves an understanding of the context, curriculum, and teaching [2] and the undertaking of multiple roles [4]. According to Clivaz and Clerc-Gregory [4], LS leaders, also referred to as 'facilitators', undertake four key roles: convenor, teacher educator, researcher, and team member. For most countries outside Japan, LS is initiated at the university level and the role of leader is taken up by a teacher educator [5,11]. Since teacher educators are usually the most knowledgeable about the LS process, they act as convenors. In this role, they chair meetings and are responsible for leading discussions and ensuring that every member contributes. While teachers might primarily see the leader as a more knowledgeable person, hence taking the role of teacher educator, and convenor, there are instances where the leader may be required by the team to contribute to the problem (e.g., teaching a mathematical concept through problem-solving or promoting student talk during a lesson) investigated in LS. In that case, the leader becomes a researcher who contributes insights towards solving the identified problem.

In initiating LS, leaders define the individual roles and collective responsibilities within the team so that each member understands their contributions to the process [12]. For each LS phase, the leader guides the team in their decisions about the goals and expectations that are set within the agreed upon and defined timeframes. For an effective communication of the goals, roles, responsibilities, and expectations, LS leaders create a safe environment where team members can share their ideas and dilemmas, establish trust, and promote collaboration with and amongst the team of teachers [2,11]. Leaders, hence, encourage open communication [11] about teachers' personal knowledge, as well as their beliefs and practices in teaching and learning. To do this, LS leaders engage teachers in reflection about teaching and learning by, for example, analysing students' work and critically studying the curriculum materials—which is particularly evident in the *kyouzaikenkyuu* phase of planning a research lesson [13].

LS leaders also play a critical role in providing structured support and targeted feedback [11] that fosters 'just-in-time' learning and opportunities for adaptation [14]. LS leaders do this by encouraging teachers to revisit and improve their lesson plans—a process whereby teachers are encouraged to reflect on the feedback received from the team and from others who are more knowledgeable. Knowledgeable others, who are invited by the LS team to help teachers be critical about their teaching pedagogy, usually include experienced LS leaders, teacher educators, and subject specialists [11]. Finally, LS leaders need to be capable of anticipating teachers' challenges and be prepared to provide the necessary guidance and support (which may include finding time to meet and reaching a consensus about issues) when they need it [11].

2.2. Developing Reflective Practice

In LS, leaders and their teachers are involved in an ongoing negotiation about goal setting, researching curriculum materials, planning the research lesson, and evaluating the outcomes [9]. As they go through this process, the leaders and teachers are bound to encounter cognitive conflicts, and the process of resolving cognitive conflicts leads to reflective practice [5]. Adopting a reflective approach to LS [6,15], that 'involves conscious awareness of behaviours, situations, and consequences' [16] (p. 217) with the goal of improving practice, enables leaders to understand and resolve uncertainties. According to Ackoff [17], the capacity to think through the results of their decision-making situations also develops the leaders' personal wisdom.

Reflective leadership, which requires critical thinking, long-term planning, and finding novel ways to solve issues [16], rests on self-awareness. Through self-awareness, leaders focus on their own behaviours by engaging in an honest self-evaluation process to assess their strengths and weaknesses in leading their team. To do this, 'reflective leaders consciously create an environment of trust' [16] (p. 222) and value open communication since they understand that team members need to feel safe to share their personal knowledge, struggles, experiences, values, and beliefs. We agree with Levine [7] that leaders should nurture a learning community that thrives on doubt, critical thinking, and reflection.

2.3. Developing a Learning Community Through Lesson Study

Over the years, the term 'professional learning community' has been used widely and broadly to describe a group of individuals working together towards a common intent while upholding common values, norms, beliefs, and trust [7]. Lesson study can be conceptualised as one such form of a professional learning community [18] where teachers seek to collectively identify an aspect within their work that requires improvement.

The literature shows that PD designed around a professional learning community model is more effective towards teacher learning [6]. However, the notion of community places demands on teachers and teacher leaders [19] as they juggle developing an understanding of its components, relationships, and requirements. For example, in engaging within a learning community, teachers may be required to share their knowledge, values, and beliefs about the subject content, teaching specific subject content and how students learn that subject content [5], and to discuss personal challenges—an experience that might prove to be demanding and uncomfortable [19]. When teachers experience a sense of belonging and trust, it paves the way for developing effective and productive ways of working, of being, and of relating to others.

2.4. Insider–Outsider Status

In the 1970s, 'insider' and 'outsider' were conceived as dichotomous constructs [20]. This divide, mostly related to the insiders' over-rapport and biases that emerge because of their close connections with participants, was rejected by scholars [21,22] who viewed it more as operating on a continuum where the 'insider' and 'outsider' constructs are conceptualised as poles. Within this view, an individual can be simultaneously an 'insider' and an 'outsider' and located in between these two poles of the continuum lie several

intermediate positions. The boundary between the 'insider' and 'outsider' poles is fluid and not clearly delineated [21] as it depends on the situations within a given context, the personalities of the researcher and the participants, and the power relationships among them [22]. Also, the relationship that the researcher has with the group of participants is not static 'but fluctuating constantly, shifting back and forth along a continuum of possibilities, from one moment to the next, from one location to the next, from one interaction to the next, and even from one discussion topic to the next' [22] (p. 13). When 'insider' and 'outsider' are conceived as poles, their strengths and limitations are valued [22].

The complexity and fluidity of the boundaries within which one can operate as 'insider' and 'outsider' can be contested [21]. Someone can be 'inside' a community according to specific criteria and, at the same time, be 'outside' by virtue of others. For example, someone may hold a school leadership position in a particular school and perform research with educators on, say, leading PD in another school. The specific role held by this person and their knowledge about leadership would make them an 'insider'. However, doing research within a different school context would make them an 'outsider'. To address this issue, Banks [23] proposed a typology based on one's perception of their community, personal beliefs about accepted values, and their behaviours within a community. The four possible positions are as follows: (1) the *indigenous–insider*—someone doing research with a community that they form a part of and with which they share the same values, behaviours, beliefs, and knowledge; (2) the *indigenous–outsider*—someone doing research with a community that they form part of but with whom they do not share the same values, behaviours, beliefs, and knowledge; (3) the *external–insider*—someone who rejects their indigenous community and endorses the values, behaviours, beliefs, and knowledge of another community that they do research with; and (4) the *external–outsider*—someone who rejects their indigenous community and does not share the values, behaviours, beliefs, and knowledge of another community that they do research with.

The literature on the *insider–outsider* status underlines the complexity, fluidity, and intricate nature of these constructs. We, thus, draw on the literature to develop a two-way classification using the categories that represent the specific PD and leadership work involved to explore the *insider–outsider* status of our postgraduate students in leading LS.

3. Conceptual Lens

3.1. Categorising Insider–Outsider Status

Based on a review of the literature on insider–outsider status and the various classifications offered, we present a categorisation that is intended to serve as a conceptual lens for classifying and analysing LS leaders' statuses. Given the complexity and fluidity of the insider and outsider constructs reported in the literature [21], we sought to come up with a classification that reflected the leadership role and LS work involved. Hence, while the *internal–external* category was informed by the literature, the *familiar–unfamiliar* category was constructed from our analysis of the data (see Findings in Section 6).

Drawing mainly on the classifications offered by Mercer [22] and Banks [23], we propose a two-way classification consisting of two dimensions: (1) *internal–external*—related to the LS leader's knowledge of and experience working within the LS school; and (2) *familiar–unfamiliar*—related to the leader's familiarity with the LS work and with taking a leadership role (see Table 1).

Table 1. Classification criteria to determine insider–outsider status of LS leaders.

Internal–External	Familiar–Unfamiliar
1. Knowledge of and prior/current experience working in a school/educational institution	1. Knowledge of LS and experience doing LS
2. Knowledge of and working relationship with participants	2. Knowledge of and prior experience in a leadership position
	3. Knowledge of and prior experience teaching specific subject and/or year group

For example, if a leader has been teaching at the school in which the LS is being conducted for quite some time (e.g., more than five years) that status would be classified as *internal*. In addition, if the participant is a teacher, does not hold a leadership position and this is their first experience with LS, then their status would be considered as *unfamiliar*. On the other hand, if a participant has been teaching at the LS school for a short time (e.g., less than a year), does not teach or has never taught at this school, then their status would be classified as *external*. In addition, if the participant is a member of the school leadership team (SLT) or holds or has held a leadership position and this is not their first experience with LS, then their status would be considered as *familiar*.

3.2. Taking a Leadership Role

LS leaders employ strategies to recruit teachers and work alongside them. This process involves negotiation such that the teachers not only engage in LS, but they also own the process. Negotiation refers to the way LS leaders facilitate and mediate the various interests, needs, and constraints of the LS team members so that they effectively achieve their goals [8]. This process usually involves finding common ground, making compromises, and navigating through different perspectives, all while keeping in mind the central aim of improving teaching practices and student outcomes. Their *insider–outsider* status as leaders is likely to shape the way they lead the LS team. The term 'shape' implies how the position, experiences, beliefs, and responsibilities of the leaders influence, guide, and mold their approach to leadership [4,11]. It reflects the way their role as leaders influences their strategies, interactions, and decision-making processes when working with their team and how they address issues related to, for example, balancing priorities, facilitating collaboration, and navigating resistance.

4. The Research Questions

Based on the review of the literature and our roles as the designers of and lecturers in the LLI5206 'Leading Lesson Study' course, we investigate how the novice LS leaders negotiated their status and how they built relationships while leading teachers. Our study was guided by three research questions, namely the following:

- How do leaders negotiate their status as they lead their lesson study team of teachers?
- How do leaders address the dilemmas encountered, deal with upcoming issues, and resolve the challenges they face during the lesson study process?
- How do the leaders' statuses shape their lesson study experiences?

5. Methodology

5.1. The Leading Lesson Study Course at the University of Malta

'Leading Lesson Study' is a 5 ECTS postgraduate university course (www.um.edu.mt/courses/studyunit/LLI5206 accessed on 30 October 2024) that is held on alternative years and delivered through weekly face-to-face lectures. This university course introduced the participants (prospective school leaders) to LS through a blended learning experience consisting of face-to-face lectures (20 h), asynchronous online activities (10 h), and field work in the form of an internship leading a group of teachers through LS within a school (25–35 h). During the face-to-face lectures and online activities, the participants learned about LS, the key LS phases (Figure 1), its cyclic process (Figure 1), and about the leadership needed to find, form, and lead a team of teachers to do LS. Concurrently, the participants held meetings with their LS team (a group of teachers chosen by the course participant) to plan their research lesson (refer to Table 2 for more details).

During school meetings, the LS team, led by the course participant, defined the learning goals based on an identified issue and then conducted related research on the issue. Equipped with resources, teaching ideas, and research evidence, the LS team then collaborated to develop a lesson plan. Eventually, the research lesson was taught by a member of the LS team while the other team members observed and collected data on the specific issue. Post-lesson, the team analysed the observed lesson to determine the extent to

which the teaching produced the desired goals. Then, the team refined the lesson plan and taught the lesson again to a different class. During the university course, the participants kept a reflective journal and produced a final report documenting the whole LS process. Lastly, the participants showcased their LS leadership at an international online conference organised by the two authors.

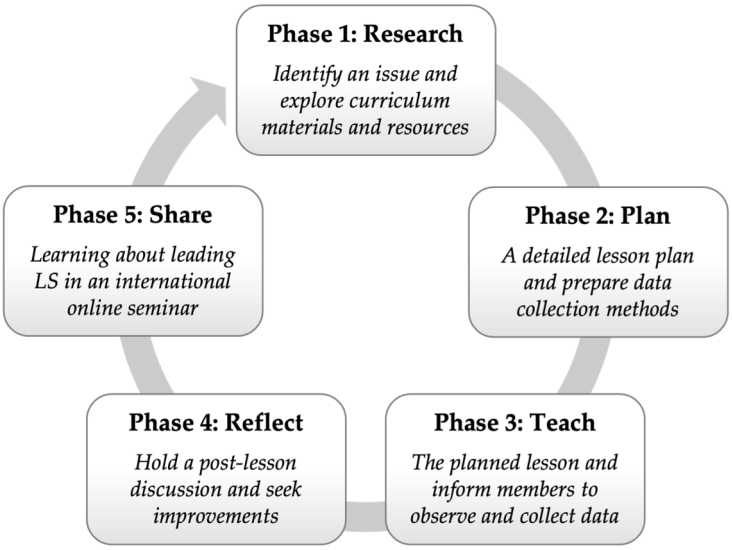

Figure 1. The lesson study phases adopted.

Table 2. The leading LS course taught at university and applied by participants at school.

LS Phases	Course Content Discussed at University	Work Carried out by Participants at Their School	Timeframes
Phase 1	• The process of LS and of initiating a LS. • LS leader's roles and responsibilities.	• Select teachers for LS. • Introduce teachers to the LS process. • Select what to teach.	November 2021
Phase 2	• The collaborative process of planning the research lesson.	• Decide which class and when to teach the lesson.	November to December 2021
Phase 3	• Observers' roles in teaching the research lesson. • The design of a data collection sheet for observers.	• Teach and observe the research lesson. • Collect data about the research lesson.	January 2022
Phase 4	• Approaches to leading a post-lesson discussion. • Analysis of sample LS reports.	• Compile and analyse the data collected. • Hold a post-lesson discussion.	January 2022
Phase 5	• Benefits and challenges of leading LS. • Share the 'learning to lead LS' experience with an international LS community.	• Compile a presentation about the leading LS experience.	February 2022

During the university course, which occurred from October 2021 up to the end of February 2022, the nine participants received support from their lecturers who acted as mentors to support them as they engaged in learning about, implementing, and leading LS. Support also included the provision of LS-related materials, discussions during face-to-face lectures, observations of LS meetings, lesson observations, and post-lesson discussions when request by the participants.

5.2. Selecting Our Two Cases

The nine participants enrolled in the 'Leading Lesson Study' course, of whom six agreed to participate in this research. Of these six, we selected the two cases whose status was classified as most contrasting within our categorization to study. For both these leaders and their teacher participants, lesson study was a novel model of professional development. Using a multiple-case case study approach [24], we carried out an in-depth study to investigate how these two of the nine prospective leaders negotiated their status as they implemented LS with their teachers.

The selection of our cases was done purposefully so that we could compare two contrasting insider–outsider statuses. Hence, using our classification (see Table 1), we selected Lara who was mostly an insider due to her *internal–familiar* status and Ann who was mostly an outsider as she was classified as *external–unfamiliar* (see Table 3). The status classifications of Lara and Ann were deductively informed by the literature and inductively constructed through our analysis of the data from the participants' reflective journals, online surveys, and focus group discussions.

Table 3. Participant information.

Leader	School	Role	Subject	Internal–External		Familiar–Unfamiliar		
				Knowledge of		Familiarity with		
				Institution	Participants	Lesson Study	Being a Leader	Subject and Year Group
Lara	Secondary	Assistant head	English	✓	✓		✓	✓
Ann	Primary	Education officer	Maltese				✓	

Lara, who was new to LS, had been an assistant head at her school for almost 3 years. Previously, she had taught English at the same school for 13 years and was, hence, familiar with both the school context and her teacher participants who were all English teachers. As a result, we could classify her status as *internal–familiar* due to her knowledge of and familiarity with the institution, the selected teacher participants, the LS subject chosen, and her leadership experience.

Ann also held a leadership role. Previously an assistant head of a primary school for four years, her role during this study was of an education officer, in charge of conducting external school reviews. However, the LS school she chose to work with was not one of the schools she reviewed. She was therefore *external* to the knowledge of the LS school as she never taught or conducted any work there. Also, it was her first time doing LS and working with the particular year group and subject. Hence, Ann's status was classified as *external–unfamiliar*.

5.3. Data Collection Methods

Our search for answers to the research questions involved the collection of qualitative data over a period of seven months (October 2021 to April 2022). We drew on three main data sources: (1) the participants' reflective LS journey journal, (2) an end-of-course online survey, and (3) a focus group discussion.

5.3.1. The Participants' Reflective LS Journey Journal

Throughout their learning about and leading an LS journey, the participants logged their experiences in a reflective journal. During the LS phases they were provided with prompts so that they could reflect on and write about the critical incidents they encountered, including the following: (a) the strategies they used to recruit teachers and the initial stages of setting up the LS team; (b) the subject, topic, or area of focus and how this was chosen; (c) the meetings with the LS team and the involvement of SLT members; (d) the lesson planning process and how they collaborated; (e) the teaching and observation of the lesson; and (f) the debriefing session. In this ongoing journal of experiences, each leader submitted nine reflective entries of about 700 to 800 words each.

5.3.2. The End-of-Course Online Survey

At the end of the course (March 2022), the participants were invited to participate in an online survey. The aim of the survey was to gather feedback from the participants both on their experience in learning about LS within the course and about their experience in leading LS within their school. The open-ended questions included the following: describing their current role, rating their overall experience leading LS, and giving a reason for their rating. They were asked about the most challenging aspect in leading LS while working with colleagues at a school and the most challenging aspect in learning about leading LS during the course. Also, they described what they learned from their leadership experience, the main takeaway from the course, an aspect about the course that supported their learning about LS, and whether they would recommend LS to their colleagues. The two final questions focused on their perceptions of LS as a PD model for teachers and the extent to which they felt prepared to lead another LS.

5.3.3. The Focus Group

The research participants took part in a focus group during which they shared experiences, dilemmas, and learning opportunities about the leading LS course, their implementation of LS, and their role as leaders. The 1.5 h focus group discussion, held online and recorded using Zoom in April 2022, was led by the two authors who used discussion prompts. These prompts, in the form of questions (e.g., What were the main challenges encountered in leading LS? How did you deal with these challenges? How advantageous was it working with the school and teachers that you chose?), served as an opportunity to help the participants to share in-depth reflections. Also, the discussion focused on the learning moments encountered throughout the process in relation to their insider–outsider status as leaders of their LS team. The focus group discussion was recorded and later transcribed.

5.4. Data Analysis

The data analysis was guided by the research questions and conducted through an iterative inductive coding process [25] to ensure a thorough and nuanced understanding of the participants' experiences and perspectives. The process involved five key stages that included the following: (1) data preparation—we transcribed the data on a Microsoft Word document and then transferred it onto a Microsoft Excel 2019 spreadsheet to facilitate note taking and coding; (2) data familiarisation—we read through the responses multiple times and made initial notes and observations about potential ideas; (3) coding—we inductively coded the data by a close reading of the text, labelling and assigning codes to suggestive phrases and words (e.g., participant selection, trust, communication, dilemmas, and sensitivity) that reflected the insider–outsider statuses and relationships while leading LS; (4) theme identification—using the 'filter' and 'sort' tools on the Microsoft Excel spreadsheet, we grouped the related codes to identify broader themes which, in our case, were 'leading the LS team' and 'leading as reflective practice'; and (5) validation—to ensure trustworthiness and reliability, we conducted the data analysis processes independently of

each other, triangulated the data from the three different instruments, and then convened to discuss and finalize the themes.

For example, we agreed to use codes such as *strategies*, *communication*, *trust*, and *involvement of SLT*. These led us to aspects related to the 'leading the LS team' theme. However, we faced disagreements related to other codes, namely: *challenges*, *issues*, *role*, *dilemmas*, and *sensitivity*, which we initially thought could be alluding to 'managing conflict'. Upon a discussion and further reading of the data, we realized that these codes were referring to a developmental process that engaged the participants in reflection. Hence, we reached an agreement and modified this second theme to 'leading through reflective practice'. In the Tables 4 and 5 below, we present the data by cross-referencing it with the assigned codes and the overarching theme.

Table 4. Emerging aspects in forming and leading an LS team.

Theme 1 **Leadership Aspect**	**Lara (Internal–Familiar)**	**Ann (External–Unfamiliar)**
Strategies to select and form the LS team (Code)	Since I was a Grade 9 class teacher myself for 10 years, my choice of educators was therefore obvious. Not only did I know the curriculum of this year group, but I also had a good relationship with the teachers. (Focus group)	I first discussed LS with the SLT. Following that meeting, the head of school suggested a team with whom I could work, and then I held a meeting with this Year 4 team. (Reflective journal, week 1)
Communication and building trust (Code)	Teachers seem willing to contribute but it is more like helping me out. It seems that they do not want to come across as unwilling to support me. I now realize that my communication about LS, roles, responsibilities, motivations, and expectations of LS might not have been clear enough. (Reflective journal, week 3)	Albeit the fact that we do communicate via a Microsoft Teams, the fact that I am not a staff member of the school might impinge and limit our communication. I think that I need to communicate more with them perhaps even face to face either before or even after the sessions. (Reflective journal, week 2)
Involvement of the school leadership team (Code)	Although I formed part of the SLT, not all members prioritized and valued LS. Eventually, though, a second member of the SLT joined the LS team. (Online survey)	The head of school was part of the LS team. Her support sustained the process of the research particularly when I was not at school. (Focus group)

Table 5. Participants' reflections on issues related to participating in LS.

Theme 2 **Reflective Aspect**	**Lara (Internal–Familiar)**	**Ann (External–Unfamiliar)**
Reflecting on dilemmas (Code)	At times, I feel bad asking them to do research and help me plan the lesson as I know that my colleagues are very busy. I feel like they are participating out of respect and to help me out, as they are my friends too. (Reflective journal, week 5)	Periodically, meeting the team has been a challenge, as all members have loaded schedules. Although no one complained and they participated actively, I still think that they went out of their way. (Reflective journal, week 8)

Table 5. *Cont.*

Theme 2 Reflective Aspect	Lara (Internal–Familiar)	Ann (External–Unfamiliar)
Reflecting on sensitive issues (Code)	I could see that, at times, teachers end up losing focus and talk about other things (possibly more important to them). For instance, I make it a point to send them the agenda but, at times, we only discuss LS during the last 10 min of the meeting. (Reflective journal, week 6)	In the beginning, I was unsure about my role and their views of LS. The fact that these teachers did not know me could initially put them in an uncomfortable position. However, over time they started seeing this LS experience as a learning opportunity. (Focus group)
Reflecting on learning and challenges (Code)	Over time, I started noticing that most teachers felt more the need to speak to me about their issues rather than on LS. This made me think that selecting a group of teachers that I knew so well was not as good a choice as I thought it would be. (Focus group)	I feel we all learned a lot as I did not just seek to lead the LS, but also to learn with them along the way through observations, discussions, and ongoing reflection. I realize that I had to be critical of my own choices so that I could learn on my leadership of LS. (Online survey)

5.5. Ethical Considerations

Due to our role as lecturers of the participants, we sought consent for participation in this research after the course assessment was over and the course results were published. This measure, supported by the University Research Ethics Committee, ensured that our participants did not feel obliged or conscripted to participate.

6. Findings

The data analysis generated two themes—'leading the LS team' and 'leading through reflective practice'. We present and discuss these themes by focusing specifically on the data from two cases to explore how their distinct insider–outsider status shaped their approaches and experiences with leading LS. Also, for a better comparison between the two cases, we illustrate the data using tables.

6.1. Leading the LS Team

In leading their LS team, the participants faced challenges and dilemmas related to developing a strategy to approach teachers, present LS, and then to select their team. Given that LS is a very different approach to the PD that teachers in Malta are used to, the participants had to be careful, yet honest, in their buy-in strategies when presenting LS and recruiting participants. Communication and trust were two aspects that the participants prioritized, possibly because they sought to have an already-established team who had already worked together rather than just gathering a group of teachers to do LS. Moreover, the participants sought to involve members of the SLT to contribute knowledge during the discussions and to support them with logistics (e.g., timetabling meetings and teacher replacement).

The data presented in Table 4 highlights the different strategies undertaken by Lara and Ann in deciding about their LS team. For example, Lara's selection strategy was mostly based on personal preferences related to performing LS with teachers and a subject area that she was knowledgeable about. Having had experience teaching English at her school, Lara selected the English teachers with whom she had a good working relationship. Her choice seemed more straightforward and based on her understanding that close collaboration is

critical. Ann, who on the other hand had more of an outsider status, employed a different and collaborative strategy. She selected a school with which she had no ties related to her work as education officer and involved the head of that primary school in the selection of the LS team. For Ann, selecting her team "involved thinking to identify the school where to carry out the LS, planning meetings with the SLT to discuss LS, its benefits, and the reasons for carrying out the LS work" (online survey).

Both Lara and Ann valued communication and building trust, and both encountered communication issues during the LS process. During the LS process, Lara realized that the teachers seemed to be feeling "a sense of obligation" (reflective journal, week 4) towards her. Rather than contributing because they believed in LS as an opportunity for their PD, these teachers seemed to see their contribution more as offering help so that Lara could complete her LS task as part of her studies. Similarly, initially Ann encountered communication issues related to her expectations and the work that teachers could contribute to. Despite their contrasting insider–outsider status, Ann and Lara encountered somewhat similar communication issues. Ann had realized, early on, that she had to improve communication and make time for more face-to-face interactions—before and after the more formal LS meetings. However, possibly due to her internal–familiar status, Lara's perception of how the teachers were contributing to LS appeared to be an ongoing struggle.

The different strategies adopted by Lara (personal) and Ann (collaborative) in forming their LS teams may have potentially shaped the way the SLTs were involved. For Lara, the decision to do LS at her school was instinctive; yet, it seemed difficult for her to involve other SLT members as "not all prioritized doing LS" (focus group). While Lara chose to select teachers who were close colleagues with whom she could do LS, Ann's approach seemed more intricate and sensitive. To recruit her participants, Ann had to first identify a school where the head of the school endorsed the concept of LS and then, conduct "a series of discussions with the head of school, SLT members, and teachers to explain the LS process and potential benefits" (focus group). With the support of the head of the school, Ann employed buy-in strategies to get the SLT and teachers on board and to make them realize that "LS offered a unique opportunity for teacher collaborative learning" (online survey).

6.2. Leading Through Reflective Practice

During their LS, the participants encountered situations that were novel and challenging. These situations posed dilemmas and cognitive conflicts, and the participants sought to tackle these through self-reflection. Through their reflective practice, the participants realised that they needed to "be sensitive to the needs of their LS team members" (Lara, online survey), and they did this by attempting to be attentive, responsive, and supportive (see Table 5). These situations, while at times complex, generated learning experiences about learning to lead LS.

Lara, who had a long-established relationship with her team and was also their assistant head, faced dilemmas related mostly to a realization that she might have been asking her team to go out of their way to contribute to her LS. Indeed, she recounted how, on numerous occasions, her team "was more interested to discuss their everyday classroom issues rather than work on LS" (focus group). Ann also reflected that the participants might have been going out of their way to contribute to LS. However, having an *external–unfamiliar* status allowed her to sit back, reflect, and be critical of her work. This act of 'doubting', which seemed to be happening more often for Ann than for Lara, allowed Ann to "start slowly and get a sense of teachers' intentions" (focus group). Ann seemed to act more as teacher educator and convener and, within this role, she managed to drive discussions around and towards LS. Lara, on the other hand, found herself acting more as a close colleague and a team member and, because of her internal–familiar status, she "found it very difficult to get the team to focus on LS" (Focus group).

Due to her insider role and her close relationship with team members, it seemed that the teachers in Lara's team saw her as more of a friend with whom they could share their ongoing uncertainties (e.g., related to issues of upcoming assessments) rather than as a PD

leader. On the other hand, Ann's outsider role appeared to have shaped the way teachers perceived her. Within her *external–unfamiliar* status, Ann's teachers seemed to perceive her more as "a teacher educator who was invited by the school to lead them through LS as a PD experience" (focus group) than as a mentor who supported them with their everyday classroom challenges. Ann's teachers might have perceived the LS meetings as a different kind of learning opportunity than Lara's teachers did. While for Ann's teachers, the meetings served as a space for professional learning through LS, Lara's teachers took this as "an opportunity to share their everyday struggles" (Online survey).

7. Discussion

In this paper, we focused on the experiences of the participants who had enrolled in a postgraduate course to learn how to lead LS. Specifically, we sought to explore how the participants negotiated their insider–outsider status as they selected and worked on LS with their team of teachers. Since as lecturers we ask participants to lead LS as part of their coursework, we purposefully chose to investigate the journey of two contrasting cases—a leader with an *internal–familiar* status and one with an *external–unfamiliar* status. Our intention, as designers and lecturers, was to better understand the mechanisms that exist within these two distinctive statuses so that we can better support our students in the future. In the ensuing discussion, we focus on the insights generated by the experiences of these two LS leaders to highlight the affordances and constraints that each status could potentially offer for a leader and how leaders may negotiate this status and relationships to successfully lead an LS team.

7.1. Leading LS Involves an Ongoing Process of Communication and Negotiation

Leading LS is a complex endeavour, particularly for novice leaders [2,8]. The present study reveals that, when asked to select a team, there is a tendency for prospective leaders to take the apparently favourable option of working with people whom they know well and with whom they have a reputable relationship. In practice, such a selection would seem to offer more affordances than constraints. Indeed, as in Dotger's [12] study, finding and recruiting participants was a critical first step for our participants and, as the data indicate, it required the employment of buy-in strategies, clear communication about LS and the related expectations for working together throughout the LS process, and ongoing negotiations [2].

Working with close colleagues and leading LS in their own school is a choice that novice leaders might see as optimal. However, for Ann, who did not work in a school, this was not possible. Within her external–unfamiliar status, Ann had to seek an alternative which meant identifying a potential school, speaking with the school leadership team, and eventually weighing whether leading LS in the school would be possible and promising. While Lara's strategy may have been driven by her personal and insider knowledge and beliefs of how she could make this LS journey successful, Ann's strategy revolved around identifying a school with a vision for implementing LS as a collaborative PD model for teachers.

Being an insider and having a close relationship with the team affords access to knowledge, a sustained rapport, and trust [22]. For Lara, who had an *internal–familiar* status within the team, this meant that she was one of the team members and, although she held a leadership position as an assistant head of the school, she was more of a close colleague and friend of the team members with a deep understanding of their feelings, experiences, and meanings. This sense of collegiality, although essential for leading LS [6], proved challenging for Lara. During LS meetings, her teachers appeared more willing to share and discuss concerns than work on LS. As research on the practices of novice PD leaders shows [8], Lara struggled to establish leading practices to facilitate discussions around LS. While Lara sought to listen and be attentive to the teachers' struggles and dilemmas, deciding when and how to steer the discussion towards LS was both challenging and delicate for her.

For Ann, whose leadership status was more of an *external–unfamiliar*, effective communication about LS and its purpose were not limited to teachers but also involved the head of the school and the school leadership team. Hence, Ann acquired knowledge through ongoing communication, discussions, and negotiations with the SLT and the teacher participants. Her limited knowledge of the institution and teachers led her to invest in developing communication by involving the head of the school in the whole LS process.

For our postgraduate students, leading a lesson study involved an ongoing process of negotiating their status with their LS team, addressing the challenges related to LS, and dealing with other emerging issues related to the teachers' daily work. Irrespective of the *insider–outsider* status, leading teachers involves an ongoing process of communication and negotiation—not just with the LS team members but also with the SLT—that keeps the team engaged and focused on their intended aim. Indeed, our findings indicate that while being an insider with an *internal–familiar* status can appear to provide an advantageous position in relation to the effective implementation of LS, this status can pose issues and even jeopardize the LS process. As the data suggest, aspects like teacher buy-in strategies and clear communication about the roles and responsibilities of members within the LS team cannot be taken for granted—it is an ongoing process that requires effort, time, and commitment on the part of the LS leader. The approach taken and strategies used by the LS leader, who was more of an outsider with an *external–unfamiliar* status, show that investing in ongoing communication and negotiation is key to effectively engaging the team in the LS process so that it is beneficial to them. Otherwise, as in the case of Lara, when teachers lose sight of the reasons for and benefits of doing LS then, along the way, they may lose their engagement with LS and, during meetings, they may tend to steer away the discussion to focus on other aspects of their daily work.

7.2. Learning to Lead LS Requires Reflective Practice

Leading LS, particularly for novice leaders, is a journey that requires an in-depth understanding of one's status in relation to both the institutional context and the LS participants, and the knowledge and experiences of the leadership and LS that the leaders bring with them [2]. This journey, which was full of challenges, required the participants to make sense of situations, and to be critical and consciously aware of the unfolding situations, as well as their decisions, behaviours, and actions. As suggested by Fernandez and Yoshida [15], in making sense of the leading LS process, the participants in the present study adopted a reflective practice to better understand their leadership role, motives, and goals within the affordances and constraints of the environment and teachers whom they led.

Our findings indicate that the leaders' *insider–outsider* status mattered. For example, when the leader was more of an insider with an *internal–familiar* status, she relied on her preconceived understandings and beliefs about the school context and the team of teachers. Hence, having more access to and a stronger relationship with the LS team members resulted, as Mercer [22] claims, in taken-for-granted assumptions, on the part of the leader, that eventually impinged on their leadership and the PD journey that they took with teachers. This was the case for Lara, who knew the teachers well as she worked in the same school and had also taught the year group considered for LS. Her closeness impinged on her role as a teacher educator, particularly when the teachers perceived her more as a friend who was there to listen to them. Indeed, Lara later realized that she had to be critical about her choice of the team that she chose to work with. This situation highlights how important it is for leaders to adopt a self-critical and reflective stance [16], that is, an approach requiring them to question their choices, behaviours, and actions and to deconstruct teachers' actions and responses to the PD that they offer them.

Conversely, within her *external–unfamiliar* status, teachers might have perceived Ann more as a PD leader and teacher educator than a friend and team member. It also seemed that Ann was cautious and took an unassuming approach. Her limited knowledge of the institution and teachers might have drove her to take a step back. Taking a step back meant

that, while leading LS based on personal beliefs, values, and knowledge, she sought to be sensitive to emerging issues, keeping a critical eye while still taking her teachers through an LS journey.

For our postgraduate students, leading LS may have appeared as a destination, that is, leading a process such that teachers may implement LS and gain knowledge from it—understandably as their work was also going to be assessed. However, along this process, these students realized that there was much more to this process—it involved building relationships with teachers and being sensitive to the challenges that they faced. This led them to reflect more deeply about themselves, their roles, and their responsibilities as leaders.

8. Final Reflections and Conclusions

This research makes an important contribution to the LS knowledge and particularly to how one may analyse the insider–outsider status of PD leaders. Also, this research highlights the way this status, which relates to the leader's knowledge of and experience working within a school and to the leader's familiarity with PD work and taking a leadership role, may shape the engagement of the team. Our conceptual lens, based on a two-way classification of their statuses, was helpful to explore the challenges that PD leaders may encounter and how they attempt to address these.

Based on this, the analysis and findings of this research direct us to two implications for leadership in PD. The first regards a consideration and an understanding of how teachers perceive PD leaders and, as Ball [26] (p. 159) argues, the 'failure to appreciate how you are perceived and identified may inhibit, distort, or channel your perceptions of events'. As we have seen, the leaders' statuses matter and will influence the kinds of interactions and communication taking place in the LS setting. A leader who holds an *internal–familiar* status may be viewed as a team member and a close colleague who has an interest in listening to and addressing teachers' contextual struggles. However, one with an *external–unfamiliar* status might be viewed more as a teacher educator who is there to lead the team through a PD experience.

The way teachers perceive PD leaders has implications for the design of leader education courses and the support that lecturers could offer to students as they learn to lead PD. Leading LS is a challenging process [3], particularly for those learning about it and practicing it for the first time with teachers. As our experiences show, in choosing teachers to lead LS, our postgraduate students may tend to approach close colleagues at their school as these are likely to be the ones with whom they have already established a sense of collegiality, gaining their trust, and, hence, would more readily support them in their LS work [2,6,22]. While this is something that we encouraged, we now think that making students aware of the implications of their choice is critical. Working with close colleagues may result in 'taken-for-granted' assumptions on the part of leaders that the participants would embrace LS and would be open about it. However, participants who have engaged in LS because they want to support the leader (a close colleague), rather than because they think highly of LS, might feel awkward about putting forward any dilemmas that they face along the journey. Hence, as lecturers, we need to help our postgraduate students to remain sensitive, alert, and open to issues that might emerge during the LS process (e.g., related to discussing their in-the-moment professional needs rather than LS). Undeniably, when leading LS, being receptive to teachers is key. As lecturers, we feel that, prior to and following the selection of an LS team, we need to support our postgraduate students to be critical of their selection, their selection process, and their 'taken-for-granted' assumptions.

Secondly, the LS leaders used buy-in strategies that offered an appealing LS experience—one that included relevant content and addressed the teachers' immediate professional learning needs [2]. Indeed, the literature shows that teachers in Malta seek collaborative PD opportunities [5,27] and LS can serve as a PD tool that provides them with a robust approach to effective PD focused on collaborative practice-based learning [3,11]. Hence, teachers need to be supported to see LS content as complementary to their practice

and not interfering with it. Additionally, the period (when LS is carried out) may influence teachers' participation and the type and level of their contribution and, as a result, it will influence the course of events [26]. Hence, successfully engaging teachers in PD requires that they have a disposition to learn, are enthusiastic about the PD journey, are committed to the work involved, and that they see it as a timely PD initiative. Surely, in making LS a successful journey, PD leaders need to seek teachers who perceive the time spent on LS as worthwhile [2].

Likewise, leader educators need to offer a space where their students can think deeply about their beliefs, values, assumptions, choices, and personal theories of teacher learning. We believe that, in the context of leader education, practice-based learning is a critical component for the acquisition of both practical and theoretical knowledge, and prospective leaders improve their on-the-job learning when they develop a reflective disposition so that they can doubt, reflect, and eventually construct their knowledge of leadership and learning. This view considers reflective practice as an essential component of leader education, because the capacity to think causes a re-examination of personal thoughts and beliefs and, in turn, develops critical thinking, problem-solving [16], and the leaders' personal wisdom [17]. Indeed, we agree with Schön [28] and propose that prospective leaders need to embrace a reflective leadership stance through opportunities where they can think in action, be responsive, and adopt timely actions.

In conclusion, our research reveals that the leaders' status, the participants' perceptions of their role and status, and the reflective stance adopted by the leader, will influence how the leading LS journey unfolds. As initiators of LS, leaders provide the structure for collaboration [29]. However, by providing time and space for the LS community to emerge, they invest in the relationships that build trust. A challenge in any PD initiative is to bridge the gap between what teachers want and expect and the leaders' own goals of PD [29]. To address what Richardson [30] referred to as the 'agenda-setting dilemma', LS leaders need to invest in an ongoing process of negotiation with the team [4], which usually involves addressing the what (including the LS phases, their roles, and their responsibilities as participants engage in it), the how (the process of collaboration and doing LS), and the why (the purpose for doing LS).

Author Contributions: Conceptualization, J.C. and L.F.; methodology, J.C. and L.F.; formal analysis, J.C. and L.F.; writing—original draft preparation, J.C. and L.F.; writing—review and editing, J.C. and L.F. All authors have read and agreed to the published version of the manuscript.

Funding: This research received no external funding.

Institutional Review Board Statement: Ethics permissions were obtained from the University Research Ethics Committee and the Office of the Registrar at the University of Malta (Approval Code: EDUC-2021-00022; Approval Date: 12 April 2022).

Informed Consent Statement: Informed consent was obtained from al the participants involved in this study.

Data Availability Statement: Due to confidentiality agreements with the participants, data pertaining to this study are available only upon request from the authors.

Acknowledgments: We are grateful for our research participants who offered their time to share their thinking and insights on their leading lesson study experiences.

Conflicts of Interest: The authors declare no conflicts of interest.

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