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**A PHENOMENOLOGICAL STUDY OF THE LIVED EXPERIENCES OF
NEW MEXICO CHARTER LEADERS THROUGH THE COVID-19 PANDEMIC**

BY

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B.A., Elementary Education, University of New Mexico, 1997
M.Ed., Educational Leadership, University of New Mexico, 2004

DISSERTATION

Submitted in Partial Fulfillment of the
Requirements for the Degree of
Doctor of Education

Educational Leadership

The University of New Mexico
Albuquerque, New Mexico

May 2023

DEDICATION

This dissertation is dedicated to all the charter leaders in New Mexico that survived leading through the pandemic. Your passion, dedication, and drive to support the students in charter schools is appreciated more than you know! Keep providing our New Mexico students with innovative practices and an environment that meets their needs.

I also dedicate this dissertation with all my love to my husband, Shawn, and my sons, Shawn Aaron and Alex. You all are my loves, and I am so blessed to have you.

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**A PHENOMENOLOGICAL STUDY OF THE LIVED EXPERIENCES OF
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BY

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B.A., ELEMENTARY EDUCATION
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ABSTRACT

The pandemic caused by the COVID-19 virus has impacted the educational landscape in unbelievable ways. The changes to the learning environment in schools required leaders to obtain and exercise different competencies. New Mexico charter leaders are leading in the new normal of public education. With the additional roles, requirements, and expectations brought on by the pandemic, leaders cannot return to their prior leadership practices. The purpose of this qualitative hermeneutic phenomenological study was to understand and give voice to the lived experiences of NM charter leaders working through the COVID-19 pandemic. The narrative of the participants highlighted four major themes: charter leadership, reinventing school, communication, and social emotional. Situational leadership provided the theoretical framework for the study and traits were present in the rich descriptions of the participants' characteristics and behaviors. Crisis management and communication were exhibited by participants as part of their practices leading through the pandemic. The data collected in this study supported the uniqueness of charter leadership as well as revealed the challenges faced during the COVID-19 pandemic. The findings from this study suggest that leaders must be flexible, supportive, understanding, courageous, and humble, especially when

navigating a crisis. Recommended topics for future research included: expanding this study to include teacher, student, families, and community perspectives on how charter leadership navigated the pandemic; and expanding to charter leaders nationwide.

Keywords: charter leadership, COVID-19, pandemic, situational leadership, crisis management, phenomenology

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Chapter 1

Introduction

The pandemic caused by the COVID-19 virus has impacted the educational landscape in unbelievable ways. In March 2020, students across the United States were given minimal notice to begin learning at home. This immediate change in learning environments caused an urgent need for leaders to obtain and exercise different competencies and behaviors than those previously needed (Francisco & Nuqui, 2020).

The change in instructional delivery continued into the 2020-21 school year, with schools providing both remote and hybrid models of instruction. Leaders were expected to be able to monitor classroom practices through Zoom or Google Meets and ensure student engagement. There was also the expectation to ensure that students attending remote sessions had what they needed to engage with learning, such as laptops, web cameras, and stable internet connections. There was an increase in home visits to provide students and families with technology and nutritional needs.

In 2021-22, the landscape changed again with the requirement to hold in-person instruction and provide remote learning. Upon their return, leaders were required to implement COVID-19 safe practices for students and staff. Schools were visited by Departments of Health and Public Education inspectors to determine if they met the requirements. The new school year also added an extra step of reporting for leaders when students or staff contracted COVID. In larger districts, this reporting responsibility was delegated, or a position was established. For charter schools, this was an additional responsibility for the leaders.

I became interested in charter schools when I was a national Baldrige consultant in 2008. At that time, I was working with a number of New Mexico schools that were

designated “schools in need of improvement” by the New Mexico Public Education Department (NM PED) under the No Child Left Behind Act (McClure, 2005). I was contracted by the Executive Director of Gilbert L. Sena Charter High School to provide training and coaching in Continuous Improvement to the staff due to the school’s designation. I worked with the charter school as their continuous improvement coach from 2008 to 2012. I was selected to become the new executive director when the former director retired in 2012. I had received my master’s degree in 2004 however this would be my first experience as the head administrator. I had yet to learn of the magnitude of the position.

Charter leaders have an additional level of accountability with the fear of their schools closing due to decreasing enrollment, attendance, and student achievement. Charter schools operate as separate entities, either as district or state-authorized schools. Each charter school is granted a charter contract through which their authorizer holds them accountable. They are required to meet those measures within their charter to maintain their contract.

In New Mexico, charter contracts are measured in three areas: student achievement, finances, and organization. Charter leaders are responsible for ensuring that the school's mission is being followed and that their charter contract is being implemented successfully without material violations. This requires charter leaders to act as district leaders when dealing with challenges. The responsibilities of charter leaders include those of both a school level principal and a district superintendent. Charter leadership is unique because in addition to traditional public school principal roles, they have several other tasks, such as maintaining facilities, managing interactions with

governance councils and school boards, and working with parents who can choose or not choose to withdraw their children from their school (Hill et al., 2002). In small charter schools, schools under 200 students, this responsibility could also include human resources, food services, and federal programs.

Wearing so many hats can be overwhelming, but the additional challenges of a global pandemic are immense. Charter leaders have now become responsible for developing and implementing COVID safe practices, reporting and monitoring positive COVID cases, and establishing surveillance and testing protocols, to name a few additional duties. They rely on the ever-changing guidance about COVID-19 to address responses, processes, procedures, and protocols.

As a charter leader during the pandemic, I was responsible for everything related to COVID-19. Gilbert L. Sena High School is a small charter school by choice due to the at-risk population it serves. Although I could have delegated this responsibility, the staff was already being spread very thin due to the needs of students and parents. The development of reentry plans was done collaboratively with staff, parents, and students' input. Teachers were overwhelmed with developing engaging virtual lessons in the 2020-21 school year. Although we had the technology and online curriculum available for students, ensuring they logged in daily for classes on Zoom was a struggle. The administration and support staff conducted many home visits to check on the welfare of students and families. During the 2020-21 school year, staff morale was low due to lack of cohesion and trust, which was brought on by being isolated from the school setting.

When the students returned to the classroom in the fall of 2021, supporting their social and emotional needs was a priority. An increase in discipline referrals was the

norm during that school year. Administration, support staff, and teachers focused on integrating students back to classroom and in-person situations. COVID protocols were required upon staff and students' return. The protocols included everything from monitoring student and staff temperatures, electrostatic disinfectant spraying every hour, MERV 13 filters, air purifiers in every room, social distancing, masks, outdoor lunches, contact tracing, and reporting of positive COVID cases, to name a few. As a charter leader, I was unable to focus my efforts on mission specific goals because I was so busy trying to ensure the safety and well-being of the staff and students. It was a very stressful and overwhelming school year. My own experience leading through the pandemic created the foundation for this research, to generate data on the lived experiences of charter leaders through the pandemic.

School leaders were dealing with changing staff situations, a lack of substitutes in the classroom, a lack of coverage of support and clerical staff, and an overwhelming culture. Leaders could not follow practices they knew or enjoyed in a time of stability, continuity, and relative calm (Harris & Jones, 2020). Before the pandemic, charter leaders at least operated within known parameters, expected requirements, and accountability. The constantly changing pandemic environment, with its additional duties and requirements, has caused uncertainty in leaders. This study explored the lived experiences of charter leaders during the pandemic and how it impacted their leadership.

Purpose of the Study

The purpose of this qualitative hermeneutic phenomenological study was to understand and give voice to the lived experiences of NM charter leaders working through the COVID-19 pandemic. Through interviews with current NM charter school

leaders, I have described the experiences shared by leaders currently working in charter schools. Charter leaders were challenged during the pandemic; this study allows them to share their experiences with their colleagues. Sharing how they led their schools and navigated through the crisis will serve as a reference point for future decision-making.

Research Question

The research question for this dissertation was: What were the lived experiences of charter leaders in New Mexico during the educational crisis of COVID-19?

Theoretical Framework

For this study, I used phenomenology as the methodological framework. Phenomenologists are interested in the analytical and descriptive experience of the phenomena by individuals in their everyday world (Creswell, 2013). There are two main philosophies in phenomenological studies: Husserl (transcendental or descriptive) and Heidegger (hermeneutic or interpretive) (Peoples, 2021).

Transcendental phenomenology takes a descriptive approach to research, whereas hermeneutics takes an interpretive approach (Eddles-Hirsch, 2015). Hermeneutic phenomenology emphasizes interpretation rather than just description from an outside perspective (Arslan & Yildirim, 2015). The central emphasis in hermeneutics is focused on experience and consciousness (Moustakas, 1994). Due to my position as a former charter school leader with my own lived experiences, I chose to use Heidegger's hermeneutic because it is the most aligned with this study.

Situational Leadership Theory

With the emergence of COVID-19, leaders must be flexible and adapt their leadership styles based on new health and learning requirements. Situational leadership

(Hersey & Blanchard, 1969) is the ability of school leaders to adapt to current situations (Francisco & Nuqui, 2020). Situational leadership theory matches a set of behaviors with a given situation (Grover & Walker, 2003). This theory proposes that there is no one-size-fits-all leadership style (Pedroso et al., 2021). Situational leadership is when the leader of an organization uses task and relationship behavior to adjust their style to support the level of the followers they are trying to influence (Gates et al., 1976). For this phenomenological study, I used the lens of situational leadership theory as I interviewed charter leaders concerning their lived experiences during the pandemic.

Crisis Management and Communication

The pandemic has caused an unprecedented crisis for schools worldwide (Kaul et al., 2020, p. 1). The pandemic has forced school leaders to be engaged in crisis and change management (Anderson & Weiner, 2023; De Voto & Superfine, 2023; Harris, 2020; Harris & Jones, 2020; Hayes & Derrington, 2023). In the context of a crisis, educational leaders must provide certainty, engender hope, engage in effective and efficient efforts, and ensure open and credible communication to all members of the school community (Smith & Riley, 2012). Leadership in a time of crisis is fundamentally different than in normal conditions. Although districts and schools are required to have plans for various crises, the pandemic has continued to have long-term effects on the instructional and non-instructional aspects of education.

Communication is a critical component of effective crisis management (Grissom & Condon, 2021). School leaders must develop a communication system for crisis management with their immediate stakeholders (Grissom & Condon, 2021). Effective communication during a pandemic outbreak can guide stakeholders in responding

appropriately to situations and complying with recommendations (Reynolds & Quinn, 2008). School leaders must define their external and internal stakeholders and develop a way to differentiate means of communication with each. I interviewed charter leaders through this study to determine how they utilized crisis management and communication during the pandemic.

Significance of the Study

Currently, no studies are exploring the lived experiences of charter leadership in New Mexico and their practices during a crisis such as COVID-19. The pandemic has impacted education at all levels; this study captured and documented the experiences of the charter leaders and how they continued to lead their schools through a crisis. Through their lived experiences, this study can document this history for future generations of charter leaders. It will provide practical insights into charter leadership styles and practices that support teachers, staff, students, parents, and the community. By providing a venue for charter leaders to share and honor their experiences in this challenging time, this study empowered current leaders to tell their stories to current and future leaders.

Delimitations

Eligible participants for this study were considered the head administrator or executive director in a New Mexico public charter school. Delimitations were that participants must have been the head administrator and worked during the COVID-19 pandemic from March 2020 through June 2022.

Definitions

1. *Authorizers* – Authorizers are entities such as LEAs or Local Education Agencies, state boards of education, or universities that have the authority to issue charters to public charter schools (Dingerson et al., 2008).
2. *Charter Schools* – Charter schools are organizations granted a contract, or charter, to operate as a public school (Weil, 2000).
3. *Dasein* – “being there” defined by Martin Heidegger in hermeneutic phenomenology (Peoples, 2021).
4. *Fore-sight/fore-conception* – *preconceived* knowledge about a phenomenon (Peoples, 2021).
5. *Hermeneutic circle* – interpretation as revision; it is a description of the process of understanding and not a technique (Arslan & Yildirim, 2015).
6. *NM PED* – New Mexico Public Education Department.
7. *NM DOH* – New Mexico Department of Health.

Summary

School leaders are in challenging positions to lead the direction of education during a crisis such as COVID-19. They are unable to go back to their practices from former years of certainty, stillness, and predictability (Harris, 2020). Even in times of crisis, leaders are expected to maintain the school’s effectiveness, culture, and increase student engagement and achievement. The purpose of this study was to understand the lived experiences of charter leadership in New Mexico and their practices during the COVID-19 pandemic. This study may allow for a better understanding of how charter

leaders adapted their leadership styles to the challenges presented by the COVID-19 pandemic.

Chapter 2

Literature Review

The literature review for this dissertation begins with a clear operational definition of charter schools in New Mexico and the role of charter leaders. The research lens to support the study's question was focused on Situational Leadership and Crisis Management theory and the possible effects the pandemic has had on NM charter leaders.

Research question: What are the lived experiences of charter leaders in New Mexico during the current educational crisis of COVID-19?

History of Charter Schools in New Mexico

In the past 50 years, the opportunity for school choice has increased. Private schools were the only opportunity of choice in the 1960s, and if families were incapable of paying tuition, then it was not a choice. In 1968, the first magnet school was opened in Tacoma, WA (Hinds, 2017), and after its success, many more magnet schools opened around the country. The creation of magnet schools in the late 1960s focused on increasing diversity and reducing racial isolation. Magnet schools and desegregation were hallmarks of education reform in the 1970s and into the 1980s (Dingerson et al., 2008).

Budde (1988) proposed the original concept of a “charter” school as a result of *A Nation at Risk* (1983) as one model for restructuring school districts. Budde (1988) provided recommendations for reorganizing schools by making substantial changes in the roles of teachers, principals, superintendents, the school board, parents, students, and others in the school community.

Shanker (1988) took the idea further and proposed the creation of a “school-within-a-school” (p. 98). He described the restructuring plan to enable any school in the

district to develop a proposal for how they could better educate students and give them a “charter” to implement that proposal (Shanker, 1988, p. 98).

The charter school movement began in the United States, with the first school opening in 1992 in Minnesota (Kahlenberg & Potter, 2014; Murphy & Shiffman, 2002; Weil, 2000). The movement has roots in a progressive agenda that viewed charters as “an important opportunity for educators to fulfil their dreams, to empower the powerless, and to help encourage a bureaucratic system to be more responsive and more effective” (Dingerson et al., 2008, p. xi). Charter schools were not viewed as a cure-all but a way to improve upon public schools, particular in urban areas dealing with race and class inequities (Dingerson et al., 2008).

Charter schools created a more flexible and innovative environment, much like magnet schools; however, they are governed independently. The critical aspects of charter schools were: 1) the freedom of choice by parents, 2) accountability through charter contracts rather than regulation, and 3) decentralization of control through school governance (Murphy & Shiffman, 2002). Some charter schools were established to address overpopulated classrooms and provide students with a smaller, personalized environment (Bickmore & Gawlik, 2017b).

The number of charter schools in the United States has increased over the last three decades, with charter school laws in 44 states, along with Washington, D.C., Guam, and Puerto Rico (National Alliance for Public Charter Schools, 2020). Charter schools serve 3.7 million students, with 7,800 charter schools and campuses nation (White, 2022). Charter schools enrolled 7.5% of all public school students during the 2020-21 school year, up from 6.8% in 2019-20 (2022). The growth of charter schools does not

appear to be slowing down with continued bipartisan political support, philanthropic investment, and strong parent demand (Bickmore & Gawlik, 2017b).

The charter school concept appealed to conservatives committed to a free-market, privatization agenda (Dingerson et al., 2008; Weil, 2000). Unfortunately, the movement to accept the idea of privatization in public schools has been due to problems within the education system. Privatizers are targeting districts struggling to keep and educate students in underserved urban areas by providing “choice” (Dingerson et al., 2008). Currently, Governor Greg Abbott has endorsed his “school choice” policy in the 2023 Texas legislature (Lopez, 2023). Abbott’s support of “school choice” is creating an education savings account program in Texas that would allow parents to use state funds to pay for their children’s private school (2023). Abbot has used parent frustration with the pandemic concerning mask wearing and learning virtually to encourage support.

New Mexico passed charter school laws in 1993. New Mexico charter school laws differ from other states because they prohibit for-profit, privatization, charter management companies from managing or operating New Mexico charter schools. The New Mexico charter statute, NMSA 1978, 22-8B-4.R: 2011, states, “The governing body shall not contract with a for-profit entity for the management of the charter schools” (2018 *New Mexico Statutes*, para. R). Charter management organizations (CMOs) are non-profit hybrid management structures that dictate charter school structures through corporate and local offices (Bickmore & Gawlik, 2017a). Educational management organizations (EMOs) are for-profit national companies that grant less autonomy, eliminate community control, and run the school more like a business (Dixson et al., 2013). Many proponents of charter schools cite that for-profit management companies are

using charter schools to accelerate privatization in public education (Weil, 2000).

Lawmakers in New Mexico established this law to ensure that state school funds go to students, not to corporate profits (Dixon, 2014).

During the New Mexico legislative sessions in 2021 and 2022, bills and proposals were introduced that would allow funding for public schools to go families for home schooling or private schools. Currently, New Mexico State's constitution does not allow public funds to be used to fund private schooling (*Article XII, New Mexico Constitution*, n.d.). Proponents of these bills and proposals want to provide New Mexico families more choices for educational services due to the "failing" schools in the state. Opponents disagree, stating that this change would take public funding from public schools. A speaker from a New Mexico advocacy group said, "Continuing to focus on improving our public schools and continued support for our charter schools is better use of public state funding"(Segarra, 2023, p. 2).

New Mexico currently serves 29,000 students in 98 public charter schools (Public Charter Schools of New Mexico, 2023). Of those 98 charter schools, 55 are authorized by the Public Education Commission or State Authorized charter schools. The other 43 are locally authorized by the district where their charter school is located. The 55 state charter schools are considered independent Local Educational Agencies (LEA). District charter schools have more autonomy than traditional public schools however they operate as part of the school district (New Mexico Public Education Department, 2023).

As of 2020-2021, the percent of students attending charter schools in urban areas of New Mexico was 5.2% compared to 28.3% in district schools (National Alliance for

Public Charter Schools, 2022). In rural and suburban areas, the percent of students attending charter schools is only about 1% (2022).

Charter School Leadership

Whether they are called principals, heads of schools, chief administrators, or executive directors, the responsibilities of a charter leader are multifaceted (Bickmore & Dowell, 2014; Blitz, 2011; Dressler, 2001). The experiences and roles of charter leaders vary from those of traditional school principals (Campbell & Gross, 2008). Running a charter school is an experience that is beyond any preparation program. Charter leaders wear many hats to ensure that not only instructional programs are implemented but the school's operations are seamless. The role of charter school leaders includes instructional leadership as well as human resources, student and staff recruitment, community engagement, school, and district politics, implementing the mission and vision, fundraising, and finances (Cetinkaya, 2016). Charter leaders have described their roles as similar to district superintendents and school principals (Blitz, 2011). Charter leaders must also implement the ever-changing reforms, initiatives, and requirements like district schools (Bickmore & Gawlik, 2017a).

Charter leadership in itself is unique. Autonomy in charter leadership is a core value behind charter schools compared with traditional public schools (Bickmore & Gawlik, 2017a; Bickmore & Gawlik, 2017b; Gawlik, 2008). With that autonomy, charter leaders have numerous responsibilities to ensure that the charter school is meeting the material terms of the charter contract. Charter school leaders must be multidisciplinary (Bickmore & Gawlik, 2017b, p. 25). Charter leaders are expected to showcase their instructional leadership skills, building management, entrepreneurial activity, financial

management, marketing, public relations, and human resource management (Bickmore & Gawlik, 2017b). A district superintendent would have additional personnel to address these areas. In the charter school, the leader is all of those; there is no central office staff to coordinate these additional responsibilities.

Charter leaders are more likely than traditional principals to leave their schools (Bickmore & Gawlik, 2017a). A study conducted by Campbell (2010) found that seventy percent of charter school principals expected to leave their schools within five years, and ten percent expected to move on to other opportunities or retire. Another study conducted in Utah found that charter school leaders had a higher turnover rate than traditional principals (Ni et al., 2015). In that study, when charter leaders left they found non-principal positions or left the school system (2015). School leadership is critical for school performance and the degree of turnover in charter schools is a concern (NASSP, 2018).

Charter school leadership is unique and charter leaders face different issues and challenges than traditional school principals. They must negotiate charter contracts with their authorizer, either the district they reside in or the state authorizer. These negotiations can be contentious due to political agendas, state requirements, or misalignment of vision or values. Charter leaders struggle with recruiting, training, and retaining quality teachers (Bickmore & Gawlik, 2017b; Blitz, 2011). A faculty and staff committed to the vision and mission of the charter school is critical to its success. Charter leaders, like principals, are developing and building their teachers' capacity to meet the needs of students whose families have chosen to attend their charter school. There is limited literature on charter school leadership and the issues and challenges they face

(Bickmore & Gawlik, 2017a). This study describes the challenges faced by charter leaders during the pandemic.

The challenges that face charter leaders are similar to those faced by rural principals. Like charter leaders, little is known about the conditions in which rural school leaders lead their schools (Hayes et al., 2021; Preston & Barnes, 2018). Few studies have been done concerning leadership practices among rural school leaders (Hayes et al., 2021). A study conducted by Carroll-Trujillo (2021) examined the needs and expectations of leaders in rural Indigenous communities in New Mexico. The study revealed administrators were not well prepared to lead in Indigenous schools. This is similar to charter leadership preparation. Mavrogordato (2017) suggests that charter school leaders need further training and development to deal with the unique tasks and complexity of the position that are not emphasized in traditional leadership programs. Some similarities between charter leaders and rural leaders are high turnover rates, dealing with multiple tasks, managing priorities, dealing with human resource and staffing issues, and site or building management (Ashton & Duncan, 2018). Charter schools and rural schools do have the same priorities of meeting the needs of their specific community or are mission driven by students and family needs (Bickmore & Gawlik, 2017b; Hayes et al., 2021).

COVID-19 Pandemic

On December 19, 2019, patients with viral pneumonia were reported in the Wuhan province of the People's Republic of China (World Health Organization, 2020). This viral pneumonia eventually became known as a novel coronavirus that spread worldwide, creating the COVID-19 pandemic. By March 2020, the World Health

Organization (WHO) officially designated the disease a global pandemic when confirmed cases climbed to 100,000 (2020). Over the next twelve months, COVID-19 placed limitations on public life that would have simply been unthinkable a few short months before (Harris, 2020). It caused major disruptions worldwide in all sectors of society, including political, social, and emotional (Khalaf, 2021). Many countries began restricting international travel and placing citizens under quarantine orders. Large gatherings were suspended in many countries and public schools closed. The United Nations (2020) stated that the COVID-19 pandemic has been the most devastating event in the past 75 years due to the spreading of human suffering and upending of people's lives. The repercussions of the COVID-19 pandemic have been severe and far-reaching worldwide (Wellcome, 2021).

COVID-19 and Education

In late February 2020, a wave of schools across the nation began closing to try to stop the virus' spread (Education Week, 2020). By the spring, 48 states, four U.S. territories, the District of Columbia, and the Department of Defense Education Activity recommended school closures for the rest of the academic year, affecting at least 50.8 million public school students (Education Week, 2020). Over the summer of 2020, public school districts and charter schools were planning on reopening in the fall. Due to the lack of federal guidance, public schools were left to follow state and local agencies' direction in planning for the new school year (Green, 2020). Many states asked districts and charter schools to devise three different plans: one for a fully remote opening, one for a hybrid opening, and one for an in-person opening (The Hunt Institute, n.d.). In late July of 2020, the New Mexico Public Education Department (NM PED) directed public

schools and the public that schools would only be offering remote learning. New Mexico schools could offer small group instruction but only to at-risk populations per the NM PED COVID toolkit (2020) guidance.

In March of 2021, the NM PED provided districts and charter schools with the “green light” to return to in-person learning. By the summer of 2021, most districts and charter schools were planning to reopen in the fall fully in-person. Prior to opening in the fall, districts and charter schools were required to submit opening plans with required COVID-19 safety protocols as well as have site visits by the NM PED for approval. Along with reopening, per the NM PED COVID toolkits, districts and charter schools were required to report all student and staff cases of COVID-19.

Although the research is still developing, it is clear that the COVID-19 pandemic has been the greatest challenge that our nation’s education system has faced (Coker et al., 2023; Daniel, 2020; Parveen et al., 2022). The pandemic has fundamentally changed how schools operate and transformed school leadership styles.

Situational Leadership Theory

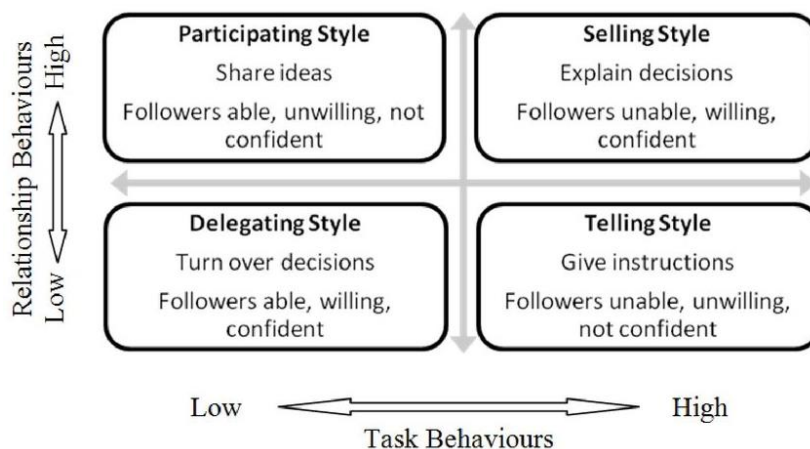
Originally developed by Hersey and Blanchard in the 1960s, situational leadership theory matches a set of behaviors with a given situation (Grover & Walker, 2003). Situational leadership is when the leader of an organization uses task and relationship behavior to adjust their leadership style to support the level of the followers they are trying to influence (Gates et al., 1976). Hersey and Blanchard’s situational leadership model (1969, 1977) became popular with practitioners because it is more intuitive and offers clearer practical guidance (Bolman & Deal, 2017). The leader behaves in one of the four following quadrants based on the readiness level of the

followers: telling, selling, participating, and delegating (Hersey & Blanchard, 1969; Papworth et al., 2009; Wright, 2017). For this model to be successful, leaders need to adapt their style to meet the demands of the followers (Cote, 2017). Leaders evaluate and assess employees based on competence and commitment to perform tasks (Cote, 2017; Gates, et al., 1976; Hersey & Blanchard, 1969; Papworth et al., 2009; Wright, 2017).

Figure 1 presents Hersey and Blanchard’s model (1969, 1977) using a two-by-two format to develop the four different leadership styles (Bolman & Deal, 2017).

Figure 1

Hersey and Blanchard Situational Model



The leader would determine which quadrant best fits their followers' task and relationship behavior. If the employee has low competence with task completion but high commitment or confidence, the leader will provide direction through structure and supervision (Papworth et al., 2009). In the second quadrant, the leader would provide coaching or explanation if the employee has some competence and low commitment (Papworth et al., 2009). In the next quadrant, the leader would provide supportive and encouraging behavior for the employee who has the competence but is unwilling or has low commitment (Papworth et al., 2009). In the last quadrant, the leader would delegate

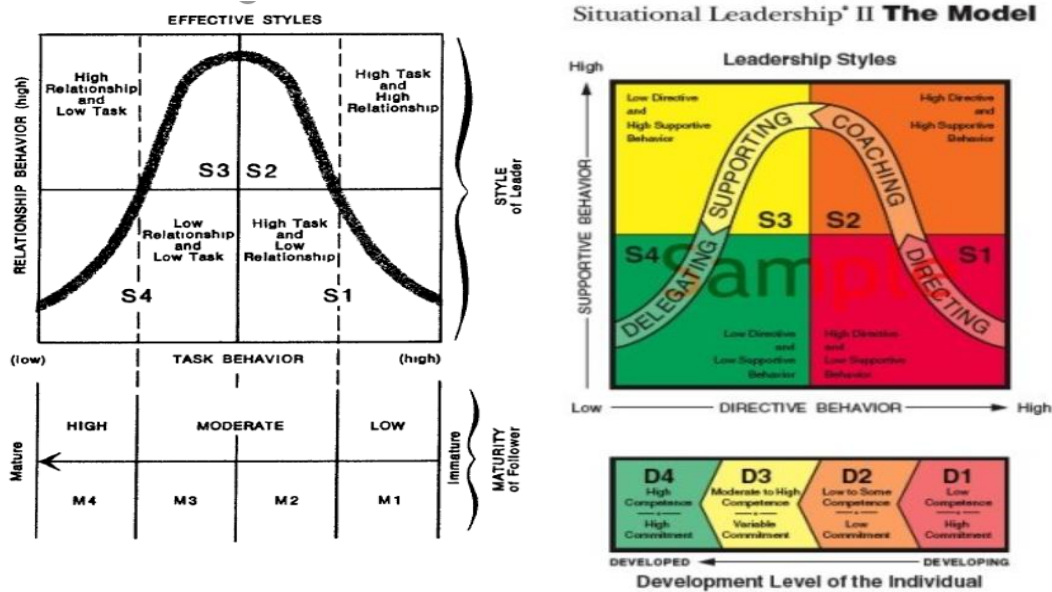
or monitor the employee's behavior with high competence, commitment, and willingness (Papworth et al., 2009). Some authors have classified situational leadership theory as a behavior theory or a contingency theory because it focuses on the leader's behaviors on tasks and relations with people (McClesky, 2014).

Evolution of the Situational Leadership Model

The Situational Leadership Model has undergone two revisions since its initial conception. The first version introduced maturity levels (Hersey & Blanchard, 1969), which became developmental levels (Blanchard et al., 1993) in the second version. The revised situational leadership II model (SLII) provides leaders the flexibility to adapt their leadership style based on the situation, the difficulty of the task, and the development level of the follower (Cote, 2017). In the revised SLII model, three of the four leadership styles were relabeled. Leadership style one became directing instead of telling; style two, coaching instead of selling; and style three, supporting instead of participating (Blanchard et al., 1993). These changes were made to make it easier for leaders to remember the two dimensions of behavior –Directive and Supporting behaviors (Blanchard et al., 1993). Figure 2 presents the evolutions of the situational leadership model (Blanchard et al., 1993).

Figure 2

A Visual Representation of the Evolution of the Situational Leadership Model



Relation with other Leadership styles

Like any other leadership style, situational leadership relies heavily on effective communication between supervisor and employee (Wright, 2017). Due to the nature of understanding the developmental levels of the organizations’ followers, the leader must develop relationships and trust with their employees. Situational leadership can also be combined with other leadership styles to optimize the organization's success (Papworth et al., 2009). Since situational leadership is a relation-orientated leadership, it compares to transformational, authentic, and servant leadership styles. They are all people-focused, inspirational, persuasive, and intellectually stimulating (McCleskey, 2014).

Situational Leadership and Education

Although most research literature discusses how the situational leadership model is used in the business sector, Hersey and Blanchard’s (1969, 1977) model can be readily

applied in education. The situational leadership model includes trust, bonding, knowledge, and heart (1969, 1977). For example, a teacher may be a rock star at developing lesson plans but struggles with classroom management. The principal may monitor lesson planning and recognize the teacher for their work, but closely supervise and coach when it comes to classroom discipline. Superintendents can also use this model to support principals in the district. If teachers are expected to differentiate for students, leaders in districts and schools should do the same. Leaders will be successful if they “can adapt their behavior to meet the demands of their unique environment” (Gates et al., 1976, p. 348). They must put aside appearances and allow themselves to be known (Broadwell, 1996). In school settings, school leaders must understand the needs of teachers, staff, parents, and students and determine what leadership style would best fit their situation.

Situational Leadership and COVID-19

The COVID-19 pandemic has further challenged the nature of school leaders’ work (Reid, 2021). School leaders have been tasked with their traditional responsibilities as well as dedicating significant time to developing processes and protocols to respond to the COVID-19 requirements for staff, students, and the community (Harris & Jones, 2020). The traditional role of school leadership in running a school and ensuring productive learning and teaching is a thing of the past. There is no going back to what was thought of as “normal.” In order to balance the expectations of staff and students who are back in the classroom after almost two years in virtual instruction, leadership practices need to be adaptive to each situation.

For situational leadership to have a positive effect, leaders need to understand and determine where followers are on the developmental continuum and adapt their leadership style to match the level of commitment and competence in achieving a task (Blanchard et al., 1993). Due to the nature of the ever-changing environment during COVID-19, I elected to use the characteristics of situational leadership as the theoretical framework for this study. Figure 3 represents the components of situational leadership I utilized.

Figure 3

Characteristics of a Theoretical Framework for Situational Leadership

<i>Hersey & Blanchard Situational Leadership Model</i>
<ul style="list-style-type: none"> ● <i>Flexibility</i> ● <i>Changes according to the situation</i> ● <i>Directing</i> ● <i>Coaching</i> ● <i>Participating</i> ● <i>Delegating</i> ● <i>Courage</i> ● <i>Integrity</i> ● <i>Clear Vision</i> ● <i>Humility</i>

Crisis Management

The pandemic has presented an unprecedented crisis for schools worldwide (Kaul et al., 2020). A crisis is a sudden and unexpected event that threatens to disrupt operations in an organization (Coombs, 2007). No past pandemic caused as many problems in education as COVID-19 (McLeod & Dulsky, 2021). School leaders must provide certainty, engender hope, engage in effective and efficient efforts, and ensure open and credible communication with all school community members (Smith & Riley,

2012). Leadership in a time of crisis is fundamentally different than in normal conditions. Although districts and schools are required to have plans for different crises, the pandemic has continued to have long-term effects on the instructional and non-instructional aspects of education (Anderson & Weiner, 2023; Coker et al., 2023; De Voto & Superfine, 2023; Parveen et al., 2022).

Crisis management aims to design a framework to help organizations return to normal after a crisis, unsafe, or unexpected event (Urlick et al., 2021). With respect to schools, five categories of crises have been established (Smith & Riley, 2010, pp. 53-54):

- (1) *Short-term crises*: ones that are sudden in arrival and swift in conclusion.
- (2) *Cathartic crises*: ones that are slow in the build-up, reach a critical point and then can be swiftly resolved.
- (3) *Long-term crises*: ones that develop slowly and then bubble along for a very long time without any clear resolution (such as the pathway of a ‘failing school’ from early warning to a significant crisis).
- (4) *One-off crises*: ones that are unique and would not be expected to recur.
- (5) *Infectious crises*: ones that occur and are seemingly resolved quickly but leave behind significant other issues to be addressed, some of which may subsequently develop into their own crises.

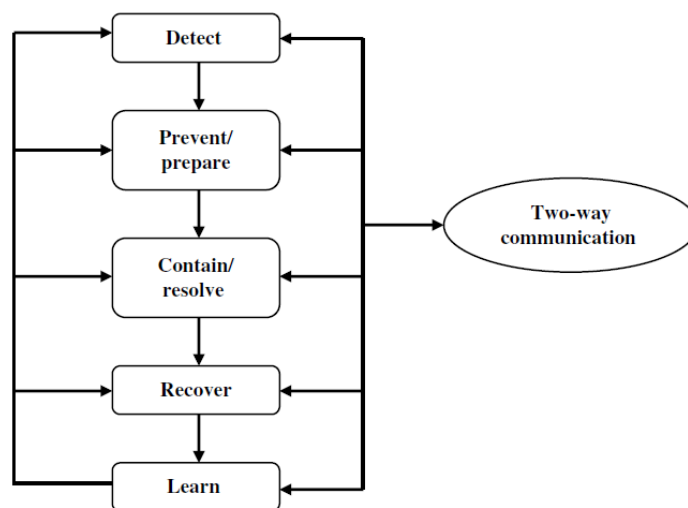
Crisis management involves a linear, three-phase strategy: prevent – respond – recover (Mayer et al., 2008). However, a linear approach to crisis management for schools implies that crises are individual and isolated events, that school leaders can anticipate the occurrence of a crisis, and that every crisis has a defined start and end

(Smith & Riley, 2012). This is not the case when it comes to schools. Schools would better be served by a cyclical model of crisis management strategy (Gainey, 2009).

Figure 4 summarizes the major features of Gainey’s cyclical model, including two-way communication to ensure leaders detect, prepare for, contain, resolve, and recover from any future crisis (Smith & Riley, 2012, p. 61).

Figure 4

Cyclical Model of Crisis Management Strategy



Over the past twenty years, school leaders have faced many significant crises, such as school shootings, the effects of hurricanes, mayhem caused by societal unrest, and the COVID-19 pandemic (Urlick et al., 2021). Although *infectious crises* are one of the five crisis categories, schools were unprepared for the magnitude of disruption the COVID-19 pandemic brought. School leaders faced logistical barriers to ensuring technology availability and establishing clear communication with all stakeholders (Kaul et al., 2020). They were tasked with various roles such as chief communicator, provider of technology, launcher of the online learning platform, food manager and distributor, tracer of the virus, and emotional support for faculty, students, and their communities

(Urick et al., 2021). Running an effective school during a pandemic requires crisis and change management as essential skills for school leaders (Harris & Jones, 2020). School leaders must be decisive in their decision-making, provide clarity and certainty, bring hope, rally effort, and ensure open and credible communication.

Crisis Communication

Leaders in crisis bring together emotional and logical cognitive skills to successfully manage a crisis (Hackman & Johnson, 2018). Communication is classified as one of those skills, including gathering facts through listening and seeking out information and feedback from stakeholders (2018). Crises can affect stakeholders physically, emotionally, and financially (Coombs, 2007). Leaders must prioritize keeping stakeholders safe from harm during a crisis (Coombs, 2007). A study was conducted to examine and assess the United States high education's response to the COVID-19 pandemic to assess crisis communication practices (Liu et al., 2021). Their study uses the best practices framework. Best practices for crisis communication have been widely used to guide organizations (Covello, 2003; Jarreau et al., 2017; Lin et al., 2016; Seeger, 2006; Seeger & Sellow, 2019). These standards focus on the experiences of leaders and experts to support organizations with their crisis responses.

Seeger (2006) and Seeger and Sellow (2019, pp. 5–11) created ten best practices for crisis communication:

1. Take a process approach to crises
2. Engage in pre-event planning
3. Form partnerships with the public
4. Listen and acknowledge the concerns of the public

5. Communicate with honesty, candor, and openness
6. Collaborate and coordinate with credible sources
7. Meet the needs of the media and remain accessible
8. Communicate with compassion
9. Accept uncertainty and ambiguity
10. Communicate a message of empowerment

Different modalities were also required during the pandemic for leaders.

Communication with staff, students, and parents had to take on a new look due to the need for remote instruction. Schools had to use digital platforms and social media to communicate with their communities (Michela et al., 2022). Leaders had to tap into existing communication infrastructures such as automated phone calls, text messages, and weekly email newsletters (Kaul et al., 2020). In some cases, this was insufficient, and the constant changes due to the pandemic became overwhelming for parents and staff. Leaders had to establish two-way communication to ensure clear, concise, relevant, accurate, and timely information was disseminated and ways for the school community to react to that information (Smith & Riley, 2012). Leaders went to great lengths to reach their school community because the stakes were extremely high (Kaul et al., 2020).

Potential effects on Charter School Leadership

The additional burdens placed on educators due to the pandemic have increased the need for resilience (Barton et al., 2020). School leadership preparation programs did not prepare leaders for the challenges faced by educators brought on by the pandemic (Harris & Jones, 2020). School leaders who put their health and well-being first were able to support their schools through the emotional toll of the pandemic (Harris & Jones,

2020). This raised questions, however, about the effects on charter leaders that may not have had self-care systems to support their well-being.

Stress and Burnout

There is abundant research on the effects of stress and burnout on principals (Byrne, 1991; DeMatthews et al., 2021; Hayes et al., 2022; Whitaker, 1996). However, few studies focus specifically on charter leaders and the effects of stress and burnout. Burnout among principals has been amplified due to the pandemic and its added demands concerning school closures, reopening, and COVID-19 safe protocols (DeMatthews et al., 2021). Principals are responsible for leading school improvement efforts, supporting high-quality instruction, and managing multiple levels of the school's organization. They maintain heavy workloads, work long hours, and are expected to be selfless and willing to put the needs of others before their own (DeMatthews et al., 2021). These challenging conditions can lead to stress and burnout. Burnout syndrome has three dimensions: emotional exhaustion, depersonalization, and negative personal accomplishment (Byrne, 1991; Maslach et al., 1997). The Maslach burnout inventory, MBI, is designed to assess these three dimensions (Maslach et al., 1997). Burnout research on educators indicates that personal, organizational, and role-related conditions are related to the three MBI scales (Maslach et al., 1997).

Summary

New Mexico charter leaders are leading in the new normal of public education. With the additional roles, requirements, and expectations brought on by the pandemic, leaders cannot return to their prior leadership practices. This literature review provides relevant research on potential leadership strategies and outcomes from the lived

experiences of charter leaders during the pandemic. While this literature review covers some possible theories and outcomes from lived experiences, charter leaders may present experiences not described in the literature.

Chapter 3

Research Design

Charter leaders' responsibilities differ from traditional district counterparts. COVID-19 had an additional impact on their everyday responsibilities. This qualitative hermeneutic phenomenological study aims to understand and give voice to the lived experiences of NM charter leaders working through the global pandemic. The research question for this dissertation was: What are the lived experiences of charter leaders in New Mexico during the current educational crisis of COVID-19?

Methodological Approach and Rationale

I used a phenomenological approach for this study. This methodology allowed me to explore the shared lived experiences of New Mexico Charter Leaders working through the pandemic. A case study approach would allow the development of a detailed portrayal and case analysis of a single case; however, it would not fully meet the requirement of focusing on the lived experiences of charter leaders. Phenomenologists are interested in the analytical and descriptive experience of the phenomenon by individuals in their everyday world (Creswell, 2013). Due to my position as a former charter school leader with my own lived experiences, I choose to use Heidegger's hermeneutics because it is the most closely aligned to the purpose of the study. Hermeneutic phenomenology emphasizes interpretation rather than just description from an outside perspective (Arslan & Yildirim, 2015). I used phenomenological methodology because it allowed me to provide detailed descriptions and personal meanings of lived experiences of charter leaders during the pandemic.

Researcher's Role

I spent ten years as the Executive Director of a charter high school in New Mexico. I have also worked as a consultant to support charter schools in New Mexico on school improvement. I have experienced the stress of running a charter school in the climate of high-stakes testing, increased accountability, and two and a half years during the pandemic.

I began my career as a charter leader in a state charter school, which meant we were our own district with minimal support from the New Mexico Public Education's charter school division. Not being part of a district, I had minimal interactions and collaboration with other charter school leaders. After seven years as a state charter school, the Governance Council and I decided to become a district charter school authorized by a district instead of the state. Becoming a district-authorized charter school came with new accountabilities but an existing support system within the district.

The pandemic has increased charter leaders' job responsibilities. I was curious to discover how charter leaders' experiences changed with the added requirements of the pandemic and what impacts it has had on their leadership practices. As a former charter leader leading through the pandemic, there is no way to separate the "being there" or *dasein*. Heidegger defined *dasein* as being in the world and believed there was no way to bracket or separate our experiences because we are always in the world with others (Peoples, 2021). Using Heidegger's approach to phenomenology, my own experiences provide an opportunity for an open and empathetic connection to other charter leaders' experiences. Using the hermeneutic circle, I made my personal biases explicit by writing

them in my dissertation and journaling and reviewing them before examining the data (Peoples, 2021).

Participants

The participants for this study were charter leaders in New Mexico charter schools that worked during the COVID-19 pandemic from March 2020 through June 2022. I used purposeful criterion-based selection (LeCompte & Preissle, 1993), a strategy through which particular settings, persons, or activities are selected deliberately to provide information (Maxwell, 2005, p. 88). There are currently ninety-eight active charter schools in New Mexico. The targeted sample size for this study was 10 to 15 charter leaders.

Recruitment

I invited participants through an email solicitation asking them to complete an electronic screening tool (Appendix A). I used the listserv for all charter leaders of state and district authorized in New Mexico. The screening tool provided me with the demographics of the leader as well as their charter school. It also asked how many years the charter leader led through the pandemic. This screener tool assisted me in determining which charter leaders fit the criteria for the study. I purposefully chose participants who would help me understand the problem and answer my research question (Creswell & Creswell, J. D., 2018). After I determined which leaders met the criteria, I sent the potential participants an email to let them know they were selected and invited them to participate in the qualitative interviews. I provided them with an electronic consent to participate.

Data Collection

I used a semi-structured qualitative interview protocol with the selected participants. The semi-structured interview protocol allowed me to construct interview questions relevant to lived experiences of charter leaders while allowing the participants to discuss other information that may be relevant to the study (Peoples, 2021). This protocol helped to maintain a balance between focusing on the research topic and allowing for a disciplined naturalness in phenomenological research (Giorgi, 1985). The charter leaders I invited to participate in the interviews would have led a charter school during the 2019-20, 2020-21, and 2021-22 school years. The interview questions gathered information on three different periods of their leadership through the pandemic.

Interview Questions

I constructed the interview questions (Appendix B) to ensure the participants would be asked about their lived experiences during the pandemic, not about thoughts, feelings, or perceptions (Peoples, 2021). Before the interviews, I briefly introduced the focus point of the research and set the tone. Interviews lasted approximately 45 minutes. I conducted the interviews virtually to provide more flexibility for charter leaders. I used the Zoom virtual meeting platform and recorded audio, video, and downloaded the transcriptions produced by Zoom for analysis.

Data Analysis

This qualitative hermeneutic phenomenological study helped me understand and give voice to the lived experiences of NM charter leaders working through the global pandemic. Hermeneutic phenomenology focuses on the interaction between the researcher and the data (Moustakas, 1994; Peoples, 2021; Vagle, 2018). This is done

through the hermeneutic circle by modifying the nature of understanding through a constant process of a renewed understanding of the phenomenon (Peoples, 2021). As part of the hermeneutic circle, I used the journaling process. In the hermeneutic circle, journaling is used to make personal biases explicit and anticipate projections in the search for understanding (Peoples, 2021). After the initial interviews, I reviewed the audio recordings and the transcriptions.

Validity and Reliability

In qualitative research, validity means that the researcher checks for the accuracy of the findings by using specific procedures (Creswell & Creswell, J. D., 2018). To ensure that the data collected in this hermeneutic phenomenological study are thorough and the results are trustworthy, I utilized six procedures from Creswell and Poth (2017) to assure validity and reliability (Peoples, 2021). Each procedure is briefly described in the following sections.

Prolonged engagement and observation

As the researcher, I developed an in-depth understanding of the phenomenon by spending extensive time with the participants in their environment and building rapport and trust (Creswell & Creswell, J. D., 2018; Peoples, 2021). Sustained engagement in the phenomenon required me to be open and sensitive to investigating the phenomenon (Vagle, 2018). This engagement supported my exploration of the phenomenon's details and allowed me to determine what is essential or irrelevant (Peoples, 2021).

Triangulation

Upon collecting the data from multiple participants, I triangulated the evidence and used it to establish a coherent justification for themes (Creswell & Creswell, J. D.,

2018). Coordinating multiple findings supported the study's validity (Creswell & Creswell, J. D., 2018; Vagle, 2018).

Peer Review

Prior to interviewing participants, the interview questions were reviewed by a charter leader non-participant. The peer review ensured that the questions would elicit responses aligned with the research question and focused on the participants' experiences. A peer reviewer was also involved in asking questions concerning the methods, results of the study, and conclusions to create accountability and honesty (Creswell & Creswell, J. D., 2018; Peoples, 2021).

Explanation of researcher bias

I chose a hermeneutic phenomenological approach because of my role and biases in this research. Using this approach to phenomenology, my own experiences provided an opportunity for an open and empathetic connection to other charter leaders' experiences. Using the hermeneutic circle, I made my personal biases explicit by writing them in my dissertation and journaling and reviewing them before examining the data (Peoples, 2021). Instead of bracketing, I recognize that I cannot escape my *lifeworld* experience. My experiences and knowledge are valuable guides to the inquiry (Neubauer et al., 2019).

Rich descriptions

Phenomenological research should exemplify the participants' lived experiences through a shared phenomenon. Ensuring a detailed description of the participant's experiences provides a context for the complexity of the lived world of the participants

(Peoples, 2021). Through rich descriptions of lived experiences, an understanding of the deeper meaning and significance is put in context (Van Manen, 1984).

External audits

In addition to peer review, I had an external auditor, someone unfamiliar with the project, who objectively assessed the project (Creswell & Creswell, J. D., 2018; Peoples, 2021). Their role was to assess the data analysis procedures and the findings to determine the accuracy and overall validity of the study (Creswell & Creswell, J. D., 2018; Peoples, 2021).

Ethics

Prior to any interviews and collection of data, I prepared and submitted an application to the UNM Institutional Review Board (IRB). To ensure respect for the participants, participation was voluntary. All volunteers were provided informed consent and had the right to withdraw from participation without penalty (Creswell & Creswell, J. D., 2018; Roberts & Hyatt, 2019). I assigned codes or pseudonyms to maintain confidentiality and omitted any identifying information (Peoples, 2021). I conducted member checking to allow participants to review the transcript of their interview for accuracy. They also reviewed my interpretations of the data, and I invited them to voice any concerns over my conclusions (Creswell & Creswell, J. D., 2018; Peoples, 2021). The participants did not express any concerns.

Summary

Charter school leadership is a phenomenon that few have experienced, and researching their lived experiences during a global pandemic could produce valuable data. There is currently limited research on the challenges facing charter leadership

especially leading through the COVID-19 pandemic. This study provided an opportunity for charter leaders to tell their stories about successes and challenges of leading through a pandemic. By examining how charter leaders approached their own leadership practices, other leaders can better understand the skillset needed when dealing with such a crisis.

Chapter 4

Results

The purpose of this study was to understand and give voice to lived experiences of New Mexico charter leaders working through the COVID-19 pandemic. I selected a phenomenological framework for my qualitative study, for which I interviewed charter leaders around New Mexico. My research question was: What are the lived experiences of charter leaders in New Mexico during the current educational crisis of COVID-19?

Sample

I received 25 responses to my initial recruitment email using the New Mexico Charter School directory from the Public Education Department website. Of the 25 responses, four participants were not the head administrator during the years 2019-20, 2020-21, and 2021-22, which excluded them from the study. An additional five were excluded for not being the person who was responsible for COVID reporting during the pandemic. I used criterion sampling (Peoples, 2021) to select a diverse sample of a maximum of 15 participants. I initiated several rounds of scheduling emails as not all 16 respondents accepted my invitations to participate in the study. I finalized a sample of 14 participants. Table 1 presents the participants' demographics.

Table 1*Participants' Demographics*

Pseudonym	Gender	Race	Education
Ana	Female	Hispanic	Master's
Barbara	Female	Hispanic	Master's
Candace	Female	White/Caucasian	Master's
Danielle	Female	White/Caucasian	Master's
Evelyn	Female	White/Caucasian	Master's
Frances	Female	White/Caucasian	Master's
George	Male	White/Caucasian	Master's
Ivan	Male	White/Caucasian	Master's
Jane	Female	White/Caucasian	Doctoral
Lee	Male	Hispanic	Doctoral
Maria	Female	White/Caucasian	Doctoral
Nancy	Female	White/Caucasian	Master's
Oscar	Male	White/Caucasian	Master's
Pam	Female	Hispanic	Master's

Of the 14 participants, 10 were female, four were male, and 10 participants identified themselves as White or Caucasian. The remaining four participants identified themselves as Hispanic. Regarding education, 11 participants had earned a master's degree and three participants had earned a doctorate. Two of the participants were currently working towards a doctoral degree. Table 2 presents the region and authorization of the participants' charter schools.

Table 2*State and Grade Level Demographics*

Pseudonym	Region	District/State	Grades
Ana	ABQ metro	District	9-12
Barbara	ABQ metro	State	6-12
Candace	ABQ metro	State	9-12
Danielle	ABQ metro	State	K-12
Evelyn	ABQ metro	District	PK-8
Frances	ABQ metro	District	6-12
George	ABQ metro	District	9-12
Ivan	ABQ metro	District	9-12
Jane	Eastern NM	State	K-12
Lee	Northern NM	District	K-8
Maria	Northern NM	State	5-12
Nancy	Northern NM	District	K-8
Oscar	Northern NM	State	9-12
Pam	Southern NM	State	9-12

Of the 14 participants, eight are in the Albuquerque metro area. Of those eight charter schools, five are authorized by the district and the State Public Education Commission authorizes three. Of the four participants in Northern New Mexico, half are district charter schools, and half are state charter schools. The last two participants are from Eastern New Mexico and Southern New Mexico; both are state authorized. The 14 participants work in a variety of differently leveled charter schools. Six participants work

at a high school with grades ninth through twelve. Three participants work in a combination of middle and high school grades five through twelve. Three participants work in a combination of elementary and middle school grades, kindergarten through eighth. The last two participants work in charter schools with kindergarten through twelfth grade. Table 3 presents the titles of each participant.

Table 3

Participants Titles

Pseudonym	Title
Ana	Executive Director
Barbara	Founder/Executive Director
Candace	Head Administrator
Danielle	Founder/CEO
Evelyn	Head Administrator
Frances	Executive Director
George	Executive Director
Ivan	Executive Director
Jane	Executive Director
Lee	Director
Maria	Director
Nancy	Founder/Executive Director
Oscar	Head Administrator
Pam	Executive Director

There is some variation in the titles held by the 14 charter leaders. Although each noted they are the top administrator in their charter school, some carry different titles. Three participants were founders and Executive Directors of their school, while six were titled executive directors. Three were titled Head Administrator, while two just took the title of Director. During the interviews, I determined that five of the 14 charter leaders were also their charter school's founder.

Coding Methods

I utilized Peoples' recommended data analysis model for phenomenological research (2021, p. 59). As part of my research, I took notes in my data journal and created a spreadsheet with my coding examples. Peoples' model includes six steps:

1. reading the entire transcript and taking out the unnecessary language (and irrelevant information);
2. generating preliminary meaning units (a piece of data that revealed a feature or trait of the phenomenon being studied);
3. generating final meaning units for each interview question (themes, as informed by deepened understanding of the participants' story);
4. synthesizing final meaning units into situated narratives under each question (a reiteration of each participant's story, where specifics and experiences are organized thematically);
5. synthesizing situated narratives into general narratives, integrating all major themes of participants (created from situated narratives, unifying participants' accounts into general description); and

6. generating a general description (unite the major phenomenological themes)
(Peoples, 2021, p. 59).

Peoples’ recommendation for extensive journaling on the researcher's part during data collection and analysis was a method I found to be the most effective. Table 4 displays an example of my coding process. See Appendix D for an example of a coded interview.

Table 4

Coding Example

Process Step	Example
Transcribing Original Text	"There's two...there's two particular statements that I make here at the school that's kind of connected with our vision and mission, and that is junto podemos together we can and somos familia we're a family, and I really truly believe in that."
Editing for Readability	"There's two particular statements that I make at the school that's connected with our vision and mission, and that is 'Juntos Podemos' – 'Together we Can' and 'Somos Familia' – 'We are a Family' and I really truly believe in that."
Assigning Meaning Unit	The preliminary meaning unit assigned is 'mission'. The secondary meaning unit is 'charter leadership'. The final meaning units are 'mission is essential to charter leadership' <i>and</i> 'mission driven is a behavior of charter school leaders'.
Determining the Situated Narrative	When mission was highlighted when discussing charter leadership responsibilities.
Determining the General Narrative	When mission was mentioned by eight of the fourteen participants while discussing charter leadership responsibilities.
Determining the General Description	Mission identified as a saturated theme regarding the roles and responsibilities of charter leaders.

Themes

I categorized themes based on People’s delineation, meaning that “most” was considered a saturated theme (2021, p. 61). A saturated theme meant that more than seven of the participants expressed a shared response. I identified 12 prominent themes and created four overarching themes with several subthemes for each. Figure 5 presents the identified themes and subthemes.

Figure 5

Identified Themes and Subthemes

Charter Leadership	Reinventing School	Communication	Social Emotional
<ul style="list-style-type: none"> ● Superintendent ● All encompassing ● Mission Driven ● COVID reporting 	<ul style="list-style-type: none"> ● Innovative practices ● Support Systems ● Balance 	<ul style="list-style-type: none"> ● Stakeholders ● Unknowns ● Sudden Change 	<ul style="list-style-type: none"> ● Discipline Behaviors ● Disengagement ● Motivation ● Fear/Stress

Situational Leadership Framework

I selected situational leadership as my lens when researching the lived experiences of charter school leaders during COVID-19 because I observed and experienced an overlap between situational leadership and the charter leaders’ behaviors. In my research, I found evidence of situational leadership in the participants' lived experiences based on Hersey and Blanchard's models (1969). Their theory suggests no one-size-fits-all leadership style, but the leadership style and technique are most appropriate for the situation (1969). I found it helpful to conceptualize the leadership components into two categories: characteristics and behaviors, meaning what leaders express internally and how they present externally. Table 5 presents the situational

leadership conceptualization I created. Table 6 presents the situational leadership components demonstrated by each participant.

Table 5

Conceptualization of Situational Leadership Characteristics and Behaviors

Characteristics	Behaviors
Coaching	Supporting
Clear Vision	Understanding
Relational	Building capacity
Courage	Listening
Flexible	
Value Others	
Humility	
Integrity	

Table 6*Situational Leadership Components Demonstrated*

Pseudonym	Situational Leadership Components Demonstrated
Ana	Courage, Clear Vision, Relational, Value Others, Humility, Flexible, Supporting
Barbara	Humility, Clear vision, Flexible, Relational, Courage, Value Others, Understanding, Supporting
Candace	Supporting, Coaching, Build Capacity, Value Others, Understanding, Listening
Danielle	Integrity, Clear vision, Flexible, Understanding, Value others, Supporting
Evelyn	Coaching, Relational, Supporting, Integrity, Humility, Value others
Frances	Supporting, Flexible, Understanding, Listening, Value Others, Building Capacity
George	Relational, Supporting, Value others, Coaching, Understanding
Ivan	Supporting, Value Others, Building Capacity, Flexible, Relational, Humility, Understanding
Jane	Supporting, Flexible, Understanding, Value Others
Lee	Supporting, Relational, Value Others, Understanding, Coaching
Maria	Clear Vision, Relational, Humility, Value Others, Coaching, Building Capacity, Supporting
Nancy	Clear Vision, Flexible, Supporting, Relational, Understanding, Humility
Oscar	Building Capacity, Humility, Clear Vision, Relational, Integrity, Understanding
Pam	Courage, Value Others, Understanding, Supporting, Humility

In the following sections, I discuss the themes and subthemes with the evidence of situational leadership through a general narrative of the participants.

Theme 1: Charter School Leadership

Leaders of charter schools have demanding, multi-roles when expected to run a high performing charter school. The responsibilities of a charter leader are multifaceted (Bickmore & Dowell, 2014; Blitz, 2011; Dressler, 2001). The pandemic placed an additional layer of responsibility on charter leaders. These responses were elicited through questions during the interviews that asked the participants to describe their roles and responsibility before the pandemic. Their responses concerning their roles and responsibilities included saturated themes that describe charter leadership as a phenomenon.

Ivan shared his experience as a first-year charter school leader and how the experience was unlike any other he had experienced as a leader. His narrative reveals the demanding multi-role of charter leaders pre-pandemic:

So, my first year was the 2019-2020 school year, and I described the first half of that year as "Drinking from a fire hose." I thought I had an idea of what I was getting into as a charter leader, but then completely really realizing I had no idea what I was getting into. Right away, being slammed with the responsibilities of finance and facilities. There just doesn't seem to be good training or professional development in those areas. You've got to learn on the fly. That was huge for me in that first half of the school year. I also came in with a lot of big ideas of what I wanted to accomplish. But then felt bogged down with the level of reporting required by PED and the constant demands of being the chief procurement officer for the school. There was a lot of learning on the job and doing the best I could.

Oscar explained how his role as a charter leader is broken up into different buckets and finding that balance to address all of them:

It (charter leadership) is in three main buckets. I have another administrator who only focuses on instructional and student stuff; that's where she and I overlap big time on the instructional program for our students. That's one big bucket that I spend a lot of time on. Then the other bucket is what would fall under the superintendent-type roles, which are facilities, business office, construction, all the things I never went to school for; all the operational stuff, human resource, policy, and superintendent district-level stuff. I think the fundraising, because of our funding model and the significant fundraising operation our school is involved in, pays for our dorm program and most of our arts programming and statewide outreach. We have to make sure that we connect with students around the state; otherwise, we can't really call ourselves a statewide school. I think my participation, even though I'm not lead on it, is fundraising. That includes private development but also like when we need to go to the roundhouse, legislative priorities, and revenue.

The charter leaders all shared their experience as the top administrator as an all-encompassing position. Everything and anything goes when you are the leader of a charter school. Danielle voiced her experience as the CEO and founder of her charter school:

"What don't I do?" I don't mean that in an arrogant way, but as a charter leader, it is everything. So, at the time, right before the pandemic, my title had shifted, and I was the CEO because we're a large school now. We opened ten years ago with 100 kids. Today we serve 2,200 students. We have two campuses. We're the first school in the State to replicate a charter school. I did the day-to-day stuff of the instruction, but I certainly had instructional coaches. I had assistant principals, but I really oversaw instruction. We have a business management group we contract with, but I am our chief financial officer. I do the CFO-type roles at the school. We work with a business management group, but I'm the chief procurement officer and do all the request for proposals (RFPs) and those types of things. So, tons around the budget. I don't mean this as arrogant, "Look at how powerful I am," but I do a lot. I know that as the founder of the school when I finally decide I'm done, I hope somebody will wear this many hats. I do all the Title Grants; Title One, Title Two, Title Three, you name the title, and I write it. I write several outside grants. I'm the grant writer, and we brought millions of dollars into our schools through grant planning. I do the facility-type stuff like the lease application. We have a nonprofit that's associated with the charter. I'm the nonprofit president, and I started the nonprofit so that we could purchase the property. I prep for the monthly board meetings and present to the board. I am responsible for the strategic plan of the school. I do the charter renewal application for the charter as well as the annual visits. You name it; I do it.

Lee also explained how his role as a charter leader is similar to a district's superintendent, however, with no central office. His narrative describes the uniqueness of charter leaders' responsibilities compared to district administration:

I tell them I'm the superintendent. I am the principal. I am the vice principal.

Many times, I am the counselor. I'm human resources. I do all the finances. Of course, we have people do the business office portion, but I have to approve every single check and every single bill. I am the school's financial officer. The position encompasses everything. I think a superintendent has it much easier than a charter director. The superintendent has all those positions filled by personnel. They have a human resource department, a finance department, and such. A charter leader has to be much more versatile. I think that if I were to go in to be a superintendent, it would be much easier (laughs).

Charter leaders are responsible for balancing all their responsibilities and duties as well as making sure the work of the school aligns with the charter mission. A charter school's success is measured by mission-specific goals that are part of the charter contract. Ana shares the importance of balancing all the responsibilities and being mission-driven:

That's the charter leader in any charter school. You function as the superintendent; you function as the principal. You function as maintenance and operations; you name it, whatever happens at the school, you're it. I think about that being the onus of responsibility and then, of course, the fiduciary responsibility over the finances. You are managing all operations of the school and making sure that every single entity, every single component of the school, is functioning in the

way that it needs to function. That aligns with your vision and your mission and is connected and grounded to who you are as a school and organization. It's a lot.

There are a lot of components and logistics. Where you think you will focus energy may shift from one minute to the next.

The pandemic added another level of responsibilities for charter leaders. A saturated theme that the participants shared was the increased responsibility that reporting placed on them during the pandemic. Reporting included weekly reports to the Department of Health portal to include: the number of positive COVID cases of students and staff, the number of staff vaccinated and not vaccinated, percentages of students and staff involved in weekly surveillance COVID testing, the number of masks given out, and any requests for additional cleaning supplies and masks. Charter leaders were also required to report positive COVID cases to the NMPED rapid response website for students and staff. They were also required to report to the NM Environmental Department for positive staff COVID cases within four hours of notification. Positive COVID case reporting also included determining with whom the positive case came in contact and including those individuals on the report. Charter leaders were also required to contact all those who came in contact with the positive case and direct them on the next steps.

Lee shared his experience with reporting and how it hindered his other responsibilities as a charter leader:

The paperwork and reporting that was required by the State were so challenging. On a weekly basis, I had to submit every Friday. Here I am trying to document everything. It took me six hours to document two different classes that had

COVID positive cases. And then, of course, I had to contact all those parents. I don't remember all the reporting, but I remember that it took me six hours for two students in two different classes to take care of all paperwork the NM PED needed. That was a waste of time. That was one of those things that I didn't need at that time. I'm an educator, not a health care provider. Those requirements from the State were the most difficult. It wasn't staff. It wasn't students. It was the reporting.

Jane shared how reporting was a challenging responsibility, especially for a virtual charter school. Even though her teachers and students were located all over the state, she was still responsible for tracking vaccinated and non-vaccinated staff and students. She shared how her work as a charter leader was impacted by the pandemic and her experience with COVID reporting:

My workload has increased dramatically. The compliance has gone through the roof. We had to track everything. Even as a virtual school! I had to report my staff at the office even though they were 25 feet apart, with air purifying filters on their desk. How do I track students who live across the state? Am I going to ask the parents? The logistic piece was a nightmare. It's not like they come through the building. High-stakes testing was a nightmare. We all traveled and set up testing venues throughout the state during state-mandated testing. Coming out of the pandemic, the question was, "How are we going to get kids and parents to come?" It was quite difficult to get parents to bring their kids to test in a group. We had to take temperatures. If my staff was going to test students, they had to do a surveillance test that week. Even if they were not involved in state testing, they

had to surveillance test because I might have to call someone and say, "So this teacher has COVID, you've got to take the testing spot. I need your negative test." Because the parents would ask at the door before state testing, "Could I see your test?" I had to tell my parents, "No, we can't show them your test." But we could tell them that we surveillance tested, and it was negative. It was just too much. It sucked so much time for me.

Theme 2: Reinventing School

The pandemic forced charter leaders to reinvent what school looked like for teachers, students, and parents. Many aspects of the school day were impacted due to the requirements of the pandemic. Charter leaders were expected to continue to deliver instruction and nutritional needs to students through innovative practices. The following section addresses charter leaders' major changes to school and leadership practices. These responses were elicited through questions about their experiences leading through the different phases of the pandemic.

Barbara shared her experience of quickly moving to remote learning in March of 2020 so that students and staff were ready at a moment's notice. Her narrative reveals the situational leadership characteristics of flexibility and supporting:

When the governor said, "Starting Monday, you need to close down your schools and get everybody online." So that's Thursday night. So, needless to say, our GC meeting took a little bit of a turn. What I'm most proud of, and this goes for most charter schools, is that we were able to turn it over in 24 hours. So, Friday came, staff checked out Chromebooks because we already had a technology plan. Our school was outfitted with Chromebook carts in every classroom. We had 220

Chromebooks. We surveyed the kids as to who didn't have a computer and who didn't have internet that day. On Friday, we checked out the Chromebooks. We checked out dance kits. They got portable dance floors. Each kid got a guitar. Each kid got a pair of castanets. Each kid got an art kit. Each kid got a computer. Monday morning, we were up and running. We learned how to use Zoom over the weekend. My teachers were phenomenal, flipping their classroom to virtual. They probably cried, screamed, pouted, and had sleepless nights, but I didn't know because they did such a freaking good job. My role, along with my co-director, was to be on the phone with families. If they're not in class, we were calling. If your camera was not on, we were calling. We supported the teachers that way and the families by providing them with hotspots. We also had free Wi-Fi in our parking lot.

Ivan explains his experience about how the sudden announcement to send students and staff home in March 2020 required immediate problem-solving. Not only were the schools required to determine how to deliver instruction, but how to meet the nutritional needs of families. His reflection reveals the situational leadership traits of supporting, relational, and valuing others:

We've got all these things to figure out immediately. We're just like we're kicking into Turbo. We spent that spring break figuring out, "How are we going start school after spring break online?" Which I knew everyone was doing. It's amazing that we all independently figured out how to do that in these different places. So, that's what I think of, it was a lot of just very sudden problem solving and then also managing, you know, helping, I think everyone was in such shock. But a lot

of the emotional work came in the very long aftermath. More so, I think there was also just that sense, which happens many times in the crisis, of rallying together. Like, what are we doing? There was, of course, trepidation. I know teachers had a lot of trepidation, like, "How could we possibly do this?" And yet that feeling of, "What other option do we have?" Because I do feel very lucky that we have a very caring and committed staff in that regard. It was just going through a lot of details and problems solving. A lot of details with short-term solutions, making sure, like getting the list of every kid who, yeah, participates in the free and reduced lunch program, and contacting every family because we're being statewide, we put together and found the resources in every single community that we had kids in. Where you can get lunch, we put together food boxes through Amazon and things like that. Our parent association jumped in with raising cash funds so that I could send out Walmart, Target, and Smith's gift cards to families, either them, that kind of thing, so, a lot of rallying.

Reinventing school also meant changing how we provided instruction to students. From August 2020 to March 2021, all students were required to learn remotely. Schools were required to develop engaging ways to deliver instruction to students. Ana shared how her project-based charter school continued to have students engage with the community and complete presentations through remote learning. Her story highlights the situational leadership characteristic of courage:

We don't have a traditional model of sit-and-get. It's all hands-on; the design and process of the courses are embedded with student involvement, community partner involvement, and then, of course, with staff. There's a lot of innovative

practice in that, just naturally. So, when we went into COVID closure, one of the things that we knew we needed to do was make sure that students didn't skip a beat in terms of accessing the curriculum, accessing resources and support, and accessing community partnerships. We already used Google Classroom pretty regularly because that's where students were connecting, submitting documents, doing PowerPoint slides, and sending those in. So, we didn't really have a huge impact in that way. Now, the one thing that we needed to do was a huge shift in our presentations of learning. So, we have exhibitions, mini-exhibitions, and then final exhibitions. So, that's their midterm and final exam. Essentially what we did was, we created a "Somos Familia" website. This website had all of the students posting. So, each class had a section on the website, and on that website, each student presented their exhibitions on the website. So, we had a certain day where everybody came in and presented, and we recorded it, and then they came into Zoom, I should say they did. The Zoom Day community partners were able to participate, and the community partners who were not there during that time could go back and see the recording, and we had commentary on the side. So, you're able to see the feedback, "really great knowledge acquisition," "here's what I'd love to hear more about," or "love to see some growth areas in these spaces." We were able to keep the integrity of what exhibitions were through this virtual lens. It was really exciting. So, we created a whole website with our presentations of learning. That website led to another website for community engagement and another for student support. Students can access those websites for resources and information and schedule an appointment with any of our student support leads,

our social workers, and our counselor. Then, of course, community engagement partnerships. So, we kept a lot of stuff, as much as possible; there were challenges, and we had to be creative. The practical placements and internships were tough because kiddos couldn't be on-site. So, we worked with the area of Aging and Long-term services, and our students did care calls. Our students were calling the elderly community and connecting and getting them set up for their COVID shots, helping them register because some were not using technology or not confident using it. So, our students were doing those care calls.

Maria's narrative shares how she supported her teachers and students by being hyper-available to them to ensure their needs were met. Even through the online instructional model, Maria continued to conduct walk-throughs, provide feedback, and provide professional development to enrich their instruction. Her account exhibits the situational leadership traits of building capacity and valuing others:

I visited classes to help kids know that I was there thinking about them. To be that additional support person and be in there listening. I also still conducted walk-throughs for my teachers during that time period, to show them I was still there to support them as they learned the model of how to move into a hybrid model and still build community. I was blown away; my teachers built a community in their class and learning routines in the model. Where the kids became a class again, and it was really impressive. I was learning as many tools as possible, then conducting little webinars with my teachers to teach them how to use them. I got in on the program Alludo, which is an asynchronous gamification. So, I still was doing everything I always did. But now I was doing it in a new way and teaching them

how to make an interactive classroom through Google Meet with all the bells and whistles that we had in there to conduct polls, and to do check-ins for their emotional needs, and have kids you know how to have boundaries around what kids were allowed to chat about. We just learned how to use our tools. Everything that I would do personally now is doing it all online. And then even being more hyper available to families to support their needs as families and know that every family was dealing with to access learning for their kid. That whole experience that year was reinventing school about every once a month to every three weeks; we were expected to reinvent the model of school, and that felt that way all year long.

Charter leaders utilized innovative practices during the pandemic to lead and support their teachers. The abruptness of campus closings required them to act quickly to provide students with technology, hot spots, and needed supplies aligned with the mission of the charter. Building capacity and support for teachers was critical. Although many schools already had the technology available, it was very different being remote for over a year. Engaging both students and teachers in constant online learning was difficult.

Theme 3: Communication

Charter leaders expressed a renewed emphasis on communication as part of their practice due to the COVID-19 pandemic. Evelyn shared, “I feel better now about responding to families, it was a hard road during COVID, but I feel more confident with the groups I interact with.” Constant communication was required to support staff, parents, and students with all the unknowns from the pandemic. Charter leaders shared the constant change of rules with the COVID toolkit provided by NM PED. COVID protocols required leaders to send students home and close classrooms due to exposure.

These responses were prompted by questions asked during the interviews concerning charter leaders' lived experiences during the two years of the pandemic. Charter leaders' responses aligned with best practices for crisis communication described by Seeger and Sellow (2006; 2019).

During the initial shutdown in March 2020, charter leaders reported an increase in communication with parents due to the lack of information about what the rest of the school year would look like. Charter leaders used different modalities to communicate with their communities. Maria explains how she communicated with parents and formed partnerships with the community. Her actions exhibit the relational situational leadership traits when communicating with her families:

I had to do a lot of triage work to support teachers and support parents, and so I did. I did a town hall-type Zoom meeting for parents every single week. I just answered their questions about how to help them and how to support them. I needed to be available to our families to support their needs. Our school has always strived to be a full system of support for families.

Ivan explained that when there was a possibility that students could return to in-person learning he sent out surveys to parents to get an idea about how many families would be willing to send their children back. By forming partnerships with his school community, Ivan reveals the situational leadership trait of flexibility and valuing others:

We did electronic surveys with families about who is comfortable coming in for small groups. The families who wanted those experiences started off pretty small. I think it was maybe a little over 40 students who wanted to come back and have that kind of experience.

Danielle shared her frustrations when communicating with parents concerning students being sent home. Her crisis communication best practice was her compassion for their situation and understanding her student population. These attributes portray her situational leadership traits of valuing others and maintaining clear vision:

I was constantly calling every kid, and then the parents were frustrated about their kids being sent home, saying, "I don't have childcare." And me saying, "I'm sorry, I'm sorry." I wish I could do something. We were constantly having meetings with families because the rules kept changing. Scheduling these meetings to keep families informed because the rules changed every other week, and families were frustrated. It was an incredibly difficult time. And again, the only thing that kept me standing was just trying to stay true to that mission. Remembering who we work with, 90% of our kids live in poverty.

During the 2021-22 school year, charter leaders were responsible for keeping track and reporting to NM PED and the NM DOH when positive COVID cases, student exposures, and classrooms were closed. This work had to be done quickly, and teachers, parents, and students had to be notified. Charter leaders took on this responsibility to be the ones to not only contact the necessary authorities but to call and notify parents.

Evelyn explained her communication process for sharing this information with her parents. Her crisis communication best practices were honesty, openness, and timeliness. Evelyn's actions demonstrate the situational leadership traits of valuing others and relational:

I had to get used to the routine of closing classrooms and reassuring everyone that it would be okay. So, I did all the work behind the scenes. I did all the

communicating and didn't put that on anyone else. I just tried to be responsive to families, and we had talked about only having the two of us, my health assistant and myself, answer families because we knew exactly what we were going to say. So, we told teachers not to answer questions and forward them to us, and we'll answer them. I had to stay organized and stay ahead of the problem just constantly, constantly, constantly that kind of stress.

During the pandemic, public schools in New Mexico were provided guidance from state and local agencies. After the closure of all schools in March 2020, schools began developing plans for reopening in the fall of 2020. Public schools in New Mexico were required to develop three plans: one for a fully remote opening, one for a hybrid opening, and one for a full in-person opening. Charter leaders shared that the process of developing these plans included getting feedback from parents, students, and staff. By the end of July 2020, it was communicated to New Mexico public schools that full in-person learning would not be allowed. During this time, charter leaders attended weekly meetings with the NM PED. Not only were leaders expected to communicate with parents about the next steps in education but ensuring the staff understood the expectations.

Ivan communicated with his staff to inform them of upcoming news and help them internalize the information. He portrays the situational leadership traits of valuing others, relational, and understanding. He reflects on his process for sharing information with his staff, which exhibits the crisis communication best practices of accepting uncertainty and ambiguity and taking a process approach to crises:

One thing I did was to be a step ahead of either what they were going to hear from the news, or what they were going to hear from PED, or [the] governor. I always thought it was important, especially for my staff, were hearing something directly from me first. To give better context and console them as well. I tried to do that as best I could, and I heard after that it was very much appreciated. Teachers in larger school districts might have heard about things for the first time from the news, which is pretty shocking. But I thought it was key because we're in a smaller district, and I only have to communicate to 40 teachers hearing from me first. I tried to approach it, not from "I want to let you know ahead of everyone else." I approached it with, "This is our approach and why it's important to be patient when you hear this in the news. This is how we should react when others talk to us because you need to be there for your students and our families." I was constantly crafting my communications to teachers, parents, and students. I have this memory of just constantly being on my laptop typing well-crafted messages.

Oscar described the communication efforts during the summer of 2020 planning for the next school year. There were still many unknowns and charter leaders were expected to develop plans for remote learning, hybrid/cohort return, and full in-person learning. The expectation was to obtain community input in the development of these plans. His response portrays the situational leadership traits of building capacity and valuing others:

Over that summer and leading into that fall, there was a lot of input gathering with surveys. It was a weekly whiplash period. There was the thinking that we would be online for a while and then come out of it. We were doing surveys around

different hybrid models, which we never ended up using and having cohorts. We never used any of those models, but we did so much surveying, stakeholder input, and Zoom town halls to involve parents in the process.

Two-way communication was key during the pandemic. Charter leaders still had parent meetings or town halls, but they were through Zoom or Google Meet. This process provided the opportunity for parents to ask questions and be able to share their concerns. It also provided leaders time to share protocols and expectations for safety and ease parents' worries about students at school. Charter leaders expressed that, in some ways, the boundaries for when teachers or leaders were in contact were blurred because students were home and not at school. Parents were helping students with homework and required help.

Barbara shared her experience of how parents needed support communicated to her and how it helped with the loss of connection due to the pandemic. Her communication best practices were forming partnerships with the public and acknowledging her community's concerns:

Another hard thing was there was no boundaries. Parents and students were calling me at nine or ten o'clock at night. "My kid is trying to do their homework, and they can't," parents would say. That wouldn't happen in a normal school day because the parents and kids go home at three or four o'clock. They know that's the boundary. If they need to talk to administrators, they would send an email. But I had parents calling me at my house, "Can you help my kid?" "Can you Zoom with them really fast because this is due at midnight tonight?" The same teachers were on the phone with kids till nine or ten o'clock at night, offering tutoring.

There was [sic] no boundaries because we didn't know how to create those on our own and still have some connection with our families.

Theme 4: Social Emotional

Through answering questions regarding the challenges and impacts of leading through the pandemic, the participants reported saturated themes related to the social and emotional issues of staff, students, parents, and themselves. Participants stated that students were impacted by the pandemic with increased disengagement during remote learning and numerous disciplinary behaviors when students returned to school. A lack of motivation from teachers was also a social emotional issue that charter leaders reported during interviews. A saturated theme under social-emotional issues was the fear and stress being felt by school staff including teachers and charter leaders. Participants also shared that parents were also fearful during the pandemic.

Charter leaders expressed changes in students' behaviors including increased disciplinary issues. Candace shared her experience when students returned during the 2021-2022 school year. Her narrative reveals the situational leadership trait of understanding:

In August of 2021, there was a lot of pushing, shoving, bickering, fighting, and these were high school students. Things you would see in early middle school. We saw the kids doing it. Lots of discipline issues, back talking, disrespect, and addicted to their phones. The disrespect that comes with the addiction to the

phone, "That's my phone, and you can't have it!" We thought the students came back like little feral cats that had to be herded, mostly in their behavior, but there were some pretty big gaps in learning, especially in math. Keeping kids in their bedrooms for 18 months was really detrimental to their overall well-being and development. It's a little scary where our kids are at.

Pam expressed her lived experience when dealing with students and parents during that first semester in 2021. Her narrative was candid on the changes she experienced from student and parents' behaviors. Pam's story highlights the situational leadership traits of courage and understanding:

Student disengagement and disrespect! In my 25 years, I have never been cussed out as many times as I did by kids that first semester. It was terrible! It was absolutely terrible. Even the parents, "Well, what the fuck's wrong with that?" Oh, my God! That language is not supposed to be used in school. The behavior that first semester that we came back was horrendous. It was terrible. I was getting cussed out, my assistant principal was getting cussed out, and my teachers were getting cussed out. I think the kids were raising themselves. Parents were either working, or they didn't care. Kids didn't know that register; with my friends, I can talk like this, and with my teachers, I talk like this. When they returned, there was no differentiation. It was just terrible. When students returned, we had graffiti all over our bathrooms. Pot and marijuana stickers were all over our school. It was just awful. Discipline was terrible.

Danielle also shared the difference in students' behaviors when they returned to school in the fall of 2021. Her recollection reveals the situational leadership traits of understanding and humility.

So, when they came back the next school year, last year, it was probably one of the most challenging years of my educational career in regard to behavior. I mean the level of defiance, disrespect, disengagement, and things. I just have never seen it like that before. The kids were completely checked out. We knew where it came from. They say it takes like 30 days to build a habit. These kids had 365 days. So, they built some very bad habits. So last year was really rough.

Students also were in need of additional emotional support due to the isolation caused by the pandemic closing schools. Nancy explained how the pandemic impacted the social and emotional needs of her students. Her account demonstrates the situational leadership traits of relational and supporting:

I think kids coming back, the social-emotional piece was definitely impacted for us, for everybody. It was the social-emotional piece because the academic piece for us really wasn't impacted too much. The social-emotional piece definitely was. And so, coming back, kids had to relearn how to be in a classroom. That was an interesting transition both for teachers and kids. They had to assimilate with other kids. Some kids were really fearful. Some kids were craving attention. They wanted to touch and hug each other. And we were telling them, "You can't touch each other." They just wanted to be with their friends. We did a lot of non-academic classroom time. That was huge for us. We know the academics were

still there. We wanted to honor the fact that kids wanted to sit and talk with each other.

Barbara shared how the impact of the pandemic's safety protocols such as social distancing and the limitations on social gatherings affected students emotionally. Barbara explains how her arts-focused charter school was affected a bit differently than other charter schools. She exhibits the situational leadership trait of courage and support:

It was hard at first because we couldn't perform. So, kids were losing interest in the arts because that's their carrot. Our kids were having suicidal ideations because that was their outlet. They lost their outlet. So, when we got to be back in person, we still couldn't perform. There were no indoor performances and no indoor graduations. Graduation was outside, and you could only invite one family member. We were trying to think of how to do an outdoor performance. It just sucked. So, we did the parade, and then, because we are performing charter school, what I did was I produced a virtual graduation that was pretty killer. We did this really beautiful virtual graduation where the kids were featured. We were making the best out of things.

Ana revealed the impact the pandemic had on the students in her charter school. She focused her insight on the student's social-emotional needs based on her background in social work. Ana's awareness of the needs of students reveals the situational leadership traits of valuing others and relational:

I think really taking a deep dive, an intentional look at our students' needs, and really thinking about things in a very different way. As educators, we have that onus of responsibility to make sure that we're showing growth and progress when

it comes to curriculum and testing. We need to focus on where students grow and evolve and become strong citizens. So, I think this has given me that opportunity to really take a step back and have that time to think about what our students experience during this time, and most importantly, the level of resilience that these kiddos have. I've always known that in some shape or form, being a social worker but experiencing a pandemic and the things that our students went through. They're already struggling with high-level poverty—all of the things that they have to deal with on a day-to-day basis. Then have a pandemic thrown on top of it. It makes you really think about, "What are priorities?" "What are our priorities as educational leaders?"

Students were not the only ones that were impacted emotionally by the pandemic. Charter leaders' responses clearly reveal that teachers were also impacted emotionally by the pandemic. Pam shared, "I was just trying to keep our teachers mentally healthy." Teachers were expected to move from normal, traditional instructional methods to remote learning over a weekend. They experienced a tremendous amount of stress and overwhelm in this new teaching environment.

George shared that his biggest challenge was supporting teachers during the pandemic. His response revealed how teachers were dealing with the change of being remote and the disengagement of students with at-home learning. George's account demonstrates the situational leadership traits of support and humility:

Probably the biggest change challenge was dealing with the teachers' mental burn out and the stress in their uncertain. I mean even fear, a lot of fear, "Can I even do this?" I think coming back to school, teachers are a little bit better. But now it's

trying to deal with all the mental issues that the students have. The students were disengaged, a lot, from the distance learning and the teachers were really hyper-engaged, trying to get everybody to participate. Now that the teachers are a little more comfortable, getting kids back they are trying to focus on getting the students to reengage.

Frances explained how the teachers' emotional needs were impacted by the isolation of remote learning. Teachers were not able to collaborate with other teachers or administrators face-to-face due to the remote learning environment. Frances presented the situational leadership traits of listening and understanding:

I would say the most challenging aspect of the leading through the pandemic would be supporting students and staff with where they were emotionally.

Teacher emotional needs were magnified because they didn't have each other to vent to or with. I think that that fell on the administrators more. They couldn't just pop in; right now, my door is closed, but usually people are popping in saying, "Oh, my God, you should see this lesson I just did, it was so exciting!" They didn't have that. They didn't have anyone to celebrate with. Or if things were challenging, they couldn't stop in for 5 min and ask for help. I think everything just kind of snowballs for them and I think that was difficult.

Due to the isolation of over a year due to remote learning teachers and students struggled to connect with each other. Students had to be taught how to be around other students and adults. Pam shared how the culture of her school was impacted by the disconnect between teachers and students. Pam's recollection exhibits the situational leadership traits of understanding and supporting:

The morale at my school was really low. Teachers were complaining. Teachers were emotional. They were crying some days. The social emotional aspect was more at the forefront versus the learning loss. Teachers were not connecting with students. Students were not connecting with other students. We were helping them to use words like, "Please, thank you, excuse me." We were trying to help them have conversations. At that time, their social and emotional needs were much more important than the learning loss.

Frances also conveyed that teacher engagement was a challenge while leading through the pandemic. She explained how trust was eroded due to the isolation of teachers working at home during the pandemic. Frances demonstrates the situational leadership trait of valuing others and understanding:

I think engagement was hard. I feel that teacher engagement was hard. I think all of our teachers were trying the best that they could to their ability given the circumstance. I think trust was eroded; because when you are not near someone, it's just like when you go to work, and everyone else is at home. The assumption is they're all playing around and you're the only one working. Even though that might not be true. So, trust gets eroded. I think that people, thought this isn't happening, or you think this, or you think that, and it's not accurate. We're working off of a lot of assumptions and it eroded trust between people.

George's account also provided insight concerning the lack of relationships caused by not being in person in schools. Many charter schools focus on relationship building to re-engage students in their education. George shared how the pandemic

impacted that ability to build those relationships with students. His reflection exhibits the situational leadership trait of relational:

Our school is really based heavily on relationships. Relationships with students and teachers, teachers and teachers, and teachers and staff. It's really heavy relationship based and that was the biggest struggle at the school. We are also an open entry, open exit school. So, we had probably 40% of our school, like our teachers, have never seen face to face ever. And so, building that relationship with somebody over Zoom was really a challenge. Even as administrators, we never saw these kids. We never met them besides on a screen. That was really hard. Yeah, you could work through conversations, you could work in problem solving issues. People are just a little shorter.

A saturated theme that was shared through the participants' responses was that of fear during the pandemic. The participants explained how leading through the pandemic they were faced, not only with their own fears, but from staff, families, and students. The news headlines became increasingly alarmist beginning in 2020 and uncertainty reigned everywhere (McLeod & Dulsky, 2021, p. 1).

Candace shared how the news of returning to in-person learning was received by the school community. She explained how parents were fearful of their children returning to the classroom when the NM PED gave the green light for students to return. Her account portrays the situational leadership trait of clear vision and understanding:

It was met with fear because it really depends on the person, the parent, and the student. So, we gave ours a choice to come back. They could stay home, or they could come back and get support. But I had to juggle the staffing needs of

bringing some kids back. We have all these statistics, but I'm going by memory; 60% to 70% came back. That 30% to 40% that we provided a remote program had fearful parents. They were still in that position where I have somebody at home, and I'm just scared. That's really what it was. We offered that remote program, and interestingly, the kids that did well in remote stayed remote.

Nancy communicated the stress and fear that was caused by the pandemic. As a leader, she shared her experience the first semester when students returned from remote learning. She described an increased workload to keep students protected, socially distanced, and keeping track of students exposed to COVID-19. Through her experience she showed situational leadership traits of flexibility and understanding:

It was very stressful at first. Actually, the first semester was really rough. A lot of fear. The teachers didn't want to come back. The teachers took a lot of time off during that time. Parents were leery for sure, wanting to know how we were protecting kids. Because we were still, in the first semester, we were in social distancing protocols. Then, of course, kids were getting COVID. We had to do all the contact tracing and the testing at school. There was a huge extra load, a medical load, which we did not have when the kids were not there. We don't have a nurse, most charters don't, and so for us to trying to figure out whether kids should be there or whether they had COVID. Then contact tracing across entire classrooms. People would get kind of crazy about that. I understand parents were scared. We have a lot of mixed families here, meaning they have grandparents and great-grandparents in their households. They were nervous and for good reason.

Pam shared how the pandemic affected her personally and the fear she had of contracting COVID-19 and spreading it to others. She reflected on the need to be fearless in the eyes of her staff, but it was not easy. Pam's reflection reveals the situational leadership traits of courage and humility:

I tried to stay engaged as much as I could with my staff. But sometimes I never even like combed my hair. I never put on makeup. So, I know that there was a little bit of depression during that time. I would come to work because that was my only saving grace. It made me get out of my house. I came and I would do work, and I would show up in and on Zoom and kids would see me at work. Yes, I'm at work. But I know that it was hard for me and as a school leader to be fearless. I was fearful. I was afraid. I am not kidding. I was so fearful until we got the shot. In eight months, I went and got tested, probably 11 times. I was so afraid of contracting COVID and then giving it to my children or giving it to my staff, the three people that were on campus. I was just so afraid. I was just terrified that I was going to get someone sick.

Maria was open on the effects the pandemic had on her mental health. She shared how working through the pandemic when the students returned was overwhelmingly stressful. She explained how the work focus had to change due to the needs of staff and students upon returning. Maria demonstrates the situational leadership traits of humility and supporting:

I pretty much worked I work seven days a week, till all hours of the day, the entire year, to the point where I just broke down and cried when we finally had hit the end. It was so hard. There was no help. I was going in and teaching, running

from classroom to classroom, and being their substitute and figuring out how to make everything work. Constantly. It was really hard. It took me to my knees with exhaustion, by the end of the year. There was no time to for self-care, for everybody else's care, and that impact is so huge. I am amazed that any of us (charter leaders) returned to do this work. It was so intense. We were shifting how we do business and shifting our expectations of ourselves and our students. I think that we have more compassion amongst our group, and I think that is a positive takeaway. I think understanding the mental health need and pulling a full mental health program into the school has been a focus and intention when it comes to funding.

Along with the stress of leading through the pandemic, charter leaders shared the theme of having an overwhelming responsibility for everyone and everything. Evelyn shared how the experience of leading through the pandemic made her feel. Her response reveals the situational leadership trait of humility. She stated, “It's like averting disaster. Averting total utter disaster is the school going to close or worse, we are going to be responsible for someone's death.”

Pam explained how the responsibility of leading through the pandemic weighed on her mind. She exhibits the situational leadership traits of humility and courage:

I was afraid I was going be responsible for somebody's passing. I felt like I had to be responsible for everybody. It was hard. I personally, just felt like I was responsible for everybody's well-being. I was darned if anybody was going to die on my watch.

Candace described her experience of navigating her responsibilities and her fear of not having the answers or being prepared. She portrays the situational leadership trait of courage:

There was this huge responsibility of making sure everybody was okay and not being quite ready. It comes down to the responsibility of the well-being of my entire community and trying to navigate it delicately, so I didn't offend anybody.

Additional Findings

Although the following items did not result in a saturated theme, I found these data important in providing additional information in answering the research question.

Leadership Philosophy

I asked each participant to describe their philosophy of leadership and how that philosophy presents on a day-to-day basis. Eight of the 14 participants shared that part of their philosophy is to be driven by the charter school's mission, which is the central work of a charter school leader (Bickmore & Gawlik, 2017a). Only one participant shared their philosophy as situational, however the other participants exemplified the situational leadership qualities such as relational, valuing others, clear vision, supporting, understanding, and listening.

Jane was one of the participants to directly confirm her philosophy on situational leadership:

I think it is to do whatever the situation necessitates at the time. They all have those labels. But it takes a combination of all of those labels to be successful. In my day-to-day work it really depends on the situation. I try to empower my staff and let them choose. I just give guidance until the time comes that I have to say, “Oh, no, we are going to do it this way because based on my past experience, this is what we need to do.” So, for me, it depends, on whatever is needed, and the situation warrants it.

Frances defined her leadership philosophy as lead by example. She exhibited situational leadership behaviors of understanding and listening:

I like to lead by example. My philosophy is all about service. I feel that our job as administrators is to provide a service to our students, teachers, and everyone on the staff. It is not about me and what I need to do but how can I help you. My personal philosophy, from my background in counseling, is “To seek to understand before I seek to be understood.” I think for quick thinkers and quick reactors that may be frustrating. I am very thoughtful, listen, and think about the whole picture before making a decision. I lead from behind; I am herding my flock.

Nancy referred to her leadership philosophy as empowering and relational. She portrayed the situational leadership traits of relational and valuing others:

So, my overall philosophy of leadership is that empowerment of others. I really believe in that collective leadership, and as a charter leader that is absolutely imperative, because you cannot do it all. It's not possible. That's why we lose so many administrators in general and they try to do it all. The empowerment of

others and building people up to have shared leadership is key in my world. Relational leadership is so incredibly important. Relational leadership allows people to know see who they are as leaders because everybody has some sort of ability to lead. They may not know it, they don't know how to put it into place, but everybody has that strength. Finding where those strengths are in each individual, each employee, and then allowing them to really feel that empowerment of whatever that thing may be. Whether it's in instruction, or it's in administration, some people are better in management type of administration than others. Some might be in building student relationships. Finding leadership opportunities for everybody is how that looks. It feels like you have a team of people, an entire building of people who have ownership in the operations of the entire organization. So instead of, "That, somebody else's job. No, it is everybody's job." Everybody steps in for each other. Then you've got an inter-web of leadership, which is tremendous.

Ivan identified his leadership philosophy as servant leadership. He revealed the situational leadership qualities of supporting and valuing others:

I really bought into the idea of servant leadership, and as a teacher, I saw that my role was to serve my students. As an administrator, I feel like my job is to serve my staff and my teachers to make sure that they can better serve the students. I take that seriously. Being a teacher and having gone through several principals and directors, and not being satisfied with the level of leadership, I took it upon myself to get an administrative certification. I characterize leadership as empowering those around me. I really try to make sure that I'm creating an

environment where teachers, staff, and students feel that they can take risks. That they can bring forth innovative ideas and they aren't just following the rules or aiming for compliance but we're really trying to innovate and strive for more. I would describe it as, I try to lift up others and empower others through leadership.

Oscar identified his leadership philosophy as compassionate, and mission driven.

He demonstrates the situational leadership practices of clear vision and listening:

My overall philosophy of leadership, the things that I try to make sure that I'm doing are to be acting with compassion, listening, and supporting. Trying to really stay focused and keep the school as a whole community focused on, "Why we're here? Who are we here for?" I think I try to lead through modeling my relationships with students by practicing what I preach and being a champion of the mission.

Ana describes her leadership philosophy as collective and collaborative. She exhibits the situational leadership practices of understanding and valuing others:

So, I would say overall my philosophy of leadership is really being engaging, interactive, and cohesive. I believe in leadership being collective. I believe in being able to hear others' perspectives, opinions, and take that into consideration. Being able to work collectively and collaboratively towards decision-making that advances student outcomes as opposed to it being a top, down approach.

Crisis Management

Although crisis management was not saturated theme, the participants did share that communication was critical to supporting their staff, families, and students.

Communication is a skill that is used by leaders when managing a crisis (Hackman &

Johnson, 2018). Five of the fourteen participants specifically stated that they felt in constant crisis during the pandemic.

Ivan reflected on his experience as a leader in crisis and how it impacted his leadership practices:

I thought about an anecdote recently about Yo-Yo Ma. Supposedly how he became such a great cellist, is the first song he ever learned as a kid was a really complicated Bach suite. He didn't like starting with something simple like “twinkle, twinkle” and build up. He started with something complicated, and that's why he got to be such a great musician. I think about my time as a leader, in my first year it was so insane and tumultuous that everything else that has come since has felt pretty manageable and easy. Nothing compares to having to cancel a graduation and a prom and having a kid in the hospital at the same time. Then a couple of months later having the death of a teacher. I don't see how things could ever get that bad again. I feel more prepared for leadership through a crisis, and having so much leadership through crisis has made me a better leader in normal times as well.

Nancy shared her experience dealing with the increased decision making, constant change, and feeling like she had not control of the situation.

Each week I felt like I was just dangling out there, especially as a state charter school. I didn't feel like I had the support. I was trying to make decisions for all of these people about their health and education. It felt like so many decisions were being made, that I had no experience with. I didn't know how to make decisions for people that weren't here. It was constant change. Change management is

gigantic and we were doing it every week. I'm surprised we didn't have more administrators ended up in a psych ward. Because that's the kind of stuff that makes you go crazy, literally for real. I would go to the gym on Thursdays to listen to the Secretary of Education speak, and I realized that was the only way I was really able to function. I would work my body at the same time so my brain would not be so clogged. As a leaders, we were definitely in crisis management and that's not a good place to be for an entire year and half.

When asked about his experience when everyone was sent home in March of 2020, Oscar explained how surreal the situation was. He described how everyone just went into crisis mode and solved the issues that needed to be solved.

I mean the word that comes to mind is just surreal, which I know it was for everybody, in every domain of life. But I think it was surreal. I think in some ways that phase of things was crisis management, like acute crisis management which weirdly I can thrive in for sure but only for a certain amount of time. So, in a sense, it kind of was like, "Okay, we've got this." We've got all these things to figure out immediately. We're just like we're kicking into turbo, and we spent that spring break figuring out, "How are we going start school after spring break online?" Which I knew everyone was doing. It's amazing that we all independently figured out how to do that around the state and nation. I think it was a lot of very sudden problem solving and then also managing and helping. I think everyone was in such shock. But I think a lot of the emotional work came in the very long aftermath. I think that happens a lot in times in the crisis, we rallied together.

Danielle shared how she led her staff when everyone was sent home in March of 2020. She describes the fear, shock, and trauma that the community was experiencing and how she as a leader listened and acknowledged their concerns.

March to June 2020, as you know, we were required to be remote. So, it was 100% remote, and we pivoted fast. We were up and running like that next week. The situation was so shocking and traumatic and scary, and not for me as a person. I think I roll with the punches. I've been through enough trauma in my life that it's hard to rattle my cage. I think that we were able to pivot fast. I think that's another aspect of leadership, I lead by example. So, when I presented with, "Okay, I'm not a 100% sure what we're going to do but we're going to be fine." I think that that really feeds students, it feeds families, and it feeds teachers. When you can have that type of energy it gives people the opportunity to take a breath.

Retirement/Contemplated resignation

As invested as the participants stated they were in the charter schools, many of them shared the stress that was elicited by the pandemic. Although there was not a saturated theme present, four of the participants shared that they contemplated resignation, and one will retire at the end of the school year. I believe it is important to highlight the participants' perspectives to demonstrate the burnout caused by the pandemic.

George shared that he had thought about retirement when asked about whether his philosophy changed due to the pandemic. He went on to explain how the additional stressors had impacted his thoughts on his position:

Yeah, I can kind of see a lot of people have just been like, “All right, I'm done.” It is very impactful, very stressful, questioning of whether it's worth it. The extra stress the teachers are going through, they bring that back to work, and that changes discipline with students and teachers. I think all of that has impacted the philosophies of a lot of people. I thought about the retirement word myself a few times, just because it feels more daunting coming back and people are far more sensitive.

When I asked how his work as a charter leader was impacted by the pandemic, Lee described how he contemplated retiring due to the daunting amount of paperwork:

Personally because of the paperwork I was going to retire. I went online and looked at all the paperwork, counted my years, and everything else and I was planning on retiring. Now, it's okay. But I went through some rough times.

Candace also explained how her work was impacted by the pandemic and the reason she has decided to retire at the end of the school year:

Personally, I am stressed and exhausted, and it's probably why I've decided to retire. It's the end result. I mean during that time I couldn't grow my own professional skills. It was throwing a bucket of water on whatever fire was going, rather than developing skills and coping mechanisms and sharing responsibilities. I'm to the point where I can't do it anymore. So, I am retiring and it's partly because of this.

Unexpected Findings

Through my interviews, I asked the participants why they chose to become a charter school leader. Although it was not a saturated theme, five of the fourteen

participants were not only the charter leader but the founder of the school as well. It was interesting to hear their stories on why they chose to open a charter school but also to hear the passion they have for the students and families they support.

Founders of Charter School

Danielle describes her rationale for opening a charter school in New Mexico:

I found the autonomy in charter schools refreshing. It was so refreshing because in all the years prior, the first 15 years of my career, I was in traditional public school settings. I always felt like I tried to leave my mark, the best I could, but I didn't know there was another way to do it. So, when I end up in a charter school, I was, "Oh, this is pretty wild," you just had so much more autonomy. New Mexico does not have the autonomy New York does. But it's still far more autonomous than the traditional public school. It always felt like your hands were tied. It was just harder. I always feel like you control your destiny. I tell people, if you are going on a diet of eating cupcakes, you are going to have to work your ass off in order to like lose the weight. That's what I felt like in traditional public school. You just have to work so much harder to make the results, because you're just fighting through so much stuff. It was not an accident, coming to New Mexico and opening a charter school. It was done with real intentionality of doing things differently. I just found that the need in New Mexico was very different. New Mexico to me was the place that absolutely really, needed good schools for kids.

Nancy shared her experience in traditional schools and why it was important for her to open a charter school in her community:

I taught in traditional school settings, almost every grade level, from kindergarten to high school for 13 years. I realized that the school system was very antiquated, as still is. I did some training then received my Master's degree in digital education. I realized that we needed to go in that direction, it worked for me as a learner and I knew there were people out there that needed that type of learning. So, I presented and tried to get districts to listen to me and to change the educational philosophy. School boards would literally fall asleep while I was giving my presentation. So, I said, "I'm opening a charter school that focuses on digital education because that's the only pathway I had to innovate."

Barbara was the co-founder to her charter school, and she shared the process of combining both of her passions; teaching and dancing, to develop a charter school that provides arts and academics for students:

I really loved the art of teaching and planning. My other story is that I danced professionally. I was a Flamenco dancer, a soloist, in a company here called the Yjastros, for 20 years. My director had developed this curriculum to teach flamenco. It's called the trilateral approach. Where you teach through theory, technique, and application. I was teaching English at the time, and I told him that I think this could work in an English classroom. I asked him if I could try it and he said to play around with it. So, I did, and my test scores went up. I had happy students when they understood the theory behind writing and I stopped getting questions like, "Why do I have to do this?" So, then I got the idea that I wanted to open up my own school. So, I contacted the head of the charter coalition, and they walked us through the application and the due dates. My director of dance and I

wrote the initial charter, and then his mom and sister came in at the end and put in the information from the National Institute of Flamenco. We also had a lawyer, a business manager, other expertise, and the dancers that were teachers. So, I went back to school and got my admin license and started fresh out of the box; opening the school, leading the school, trying to dance. That was probably one of the most overwhelming times of my life. I knew nothing about school leadership and didn't really have any mentorship.

Summary

In this chapter, I described the sample, coding methods, themes, and unexpected findings as I examined the data to answer my guiding question: What are the lived experiences of charter leaders in New Mexico during the educational crisis of COVID-19? I discussed the evidence of situational leadership as my theoretical framework within the narratives of the participants. I also use the framework of crisis management communication as a lens for the participants' responses concerning their communication during the pandemic.

I conducted the study because I was interested in eliciting the lived experiences of New Mexico charter leaders through the pandemic. As I expected, the participants were open, honest, and candid in the process. The participants' tone during each interview was that of gratitude for an opportunity to share their story. Their dedication to each of their charter schools and the profession was extremely evident and that contributed to the depth of the data they provided.

Through the use of a semi-structure interview process, I revealed 12 overarching phenomenological themes and then consolidated those into four major themes with

subthemes for each. The four themes were Charter Leadership, Reinventing School, Communication, and Social Emotional.

When questioned about their role and responsibility as a charter leader, the participants shared a saturated theme of the how the role is all-encompassing, similar to a superintendent and a principal, and how their work is driven by the work of the charter school's mission. When asking the participants about their experiences leading through the pandemic another saturated theme that emerged was the immense amount of reporting and paperwork required that impacted their ability to focus on their mission driven work.

Reinventing school became a theme when the participants described how they met the educational needs of students in a very non-traditional manner through the pandemic. Charter schools are known for their innovative practices in engaging educational practices (Budde, 1988; Shanker, 1988). In the pandemic, this innovation was taken to the next level. Charter leaders had to ensure students had what they needed for remote learning as well as for when they returned. The participants also revealed how they implemented support systems to support teachers in their teaching practice as well as students and families with nutritional and social emotional support.

The participants reported that communication was critical in managing through the pandemic. The pandemic affected stakeholders physically and emotionally and the need for best practices for crisis communication was required (Seeger, 2006; Seeger & Sellow, 2019). The leaders shared the constant changes with COVID-19 protocols and even unknowns caused fear with families and staff. In order to build relationships with all stakeholders, communication was key.

An overpowering saturated theme described by the participants was the social and emotional impact the pandemic had on leadership, staff, families, and students. The participants shared that discipline behaviors increased upon the students return in the fall of 2021. The themes of disengagement and motivation were also experienced. The participants described how teachers, students and they became disengaged and unmotivated during different time periods of the pandemic. The pandemic caused fear for staff and students returning to school, a fear of catching or giving COVID-19 to others, and fear of being the cause of someone's death. Finally, the participants reflected on the tremendous amount of stress the pandemic caused to everyone involved. They expressed how tired they were at the end of the school year and the lack of self-care and down time they experienced.

My research also revealed additional and unexpected findings that I found to be meaningful in answering the research question. Those areas discovered were Leadership Philosophy, Crisis Management, Retirement/Contemplated Resignation, and Founders of Charter Schools.

While I purposefully did not ask the participants any questions regarding situational leadership, I did find evidence of characteristics and behaviors rooted in their responses. Only one participant referenced situational leadership as her leadership philosophy. Each of 13 components of situational leadership I defined in my conceptualization based on the work of Hershey and Blanchard (1993; 1969, 1977) was connected to the participants' responses.

Crisis management was not a saturated theme; however, the components of crisis communication were present in the participants' responses. Participants did express the

need for quick decision making due to the sudden changes caused by the pandemic. The need for on-the-spot problem solving was required to meet all the changes elicited by the pandemic. Some participants shared that due to the effects of the pandemic, they researched or contemplated resigning from their positions. The effects of the pandemic had caused them to reflect on their own well-being.

An unexpected finding through the study was to determine how many founders of charter schools were participants. Five of the participants were founders of their charter school and went through the process of writing the charter application and leading their school before and after the pandemic.

The rich descriptions provide by the New Mexico charter leaders who agreed to participate in this study have set the foundation for future research on this topic. I hope that the findings in this research will help other educators understand the role of charter leaders and the impact the pandemic had on their leadership.

Chapter 5

Discussion

The purpose of this study was to understand and give voice to the lived experiences of New Mexico charter leaders working through the COVID-19 pandemic. My own experience working as a charter leader through the pandemic influenced me to create a study that would highlight the challenges faced by charter leaders and provide a venue to share their lived experiences. In this chapter, I discuss the implications of the results, limitations, recommendations for policy and practice, and future research.

Implications for Leadership

Education worldwide was impacted by the COVID-19 pandemic. New Mexico charter leaders being all-encompassing leaders were expected to reinvent how charter schools operated and how to best meet the needs of teachers and students instructional,

socially, and emotionally for the past two and half years. Charter leaders had to navigate their schools during a time of crisis.

My findings demonstrated that charter leaders are unique leaders in New Mexico. They not only act as building principals but as a superintendent, chief financial officers, human resources, facility managers, instructional leaders, etc. Each of the participants shared a unique role and how it differs from a traditional school principal. Charter leaders have to balance their autonomy and accountability while being mission driven towards the charters goals. Although charter leaders are similar to rural school principals, their overall onus of responsibility to authorizers to meet their charter contract performance, organizational, and financial requirements is an additional obligation. If charter schools do not meet the contractual requirements, they could be closed which is not the case in traditional public schools or rural schools. The participants' responses demonstrate their understanding of this enormous responsibility as a charter leader. Jane stated, "There is no rulebook, there is no mentorship. We go to school, we take courses and they think you can do it." All participants are passionate about their work and committed to the mission of their charter schools. I believe a further examination of the challenges of being a charter leader is warranted to determine how to best support their retention.

This study revealed that during the pandemic, charter leaders reinvented education at their schools. Although this was a challenging task, each participant provided their stories of successes on how they continued to provide instruction remotely, through a hybrid approach, and in-person learning. Charter leaders were innovative in their means of engaging students in learning and secured funding to purchase the needed

technology and internet services for students. Charter leaders embraced innovative practices to ensure students and families' needs were met.

Communication during the pandemic was a key finding in this study. The participants utilized several different modalities to engage with parents, students, staff, and the community during the pandemic. Although crisis management was not a saturated theme, how the charter leaders communicated aligned to the crisis communication best practices in Seeger and Sellow's work (2006; 2019). The participants did reveal that the pandemic caused sudden changes in the school's environment that required them to make decisions quickly. The shock and fear associated with the pandemic caused the participants to step out of their comfort zone and make decisions for which they were not trained or prepared.

The biggest challenge faced by charter leaders during the pandemic was the impact on social and emotional issues for teachers, staff, students, parents, and charter leaders themselves. Students were disengaged after several months of remote learning even with all the efforts from teachers to develop engaging activities virtually. The participants shared the fear felt by staff, parents, and students when the NM PED recommended students return to in-person learning. This fear caused a lack of trust and conflict with schools and caused a lack of positive morale in the school's culture. Charter leaders expressed a lack of connection with staff and the school community due to the isolation of schools being closed. The participants described the difference in students upon their return to in-person learning. The lack of interactions for a year and a half had really affected their ability to socialize with each other as well as increased the number of discipline referrals.

Limitations

The COVID-19 pandemic limited this study, as I was unable to visit any of the charter school sites and meet face-to-face with the participants when interviewing them. In addition, interviews occurred during the fall months when most participants are quite busy with site visits, state reporting, and other beginning of the year activities. This may have contributed to lack of more responses. In the future, research interviews may need to take place in the summer months when the participants are not actively leading schools. While I am pleased that was able to interview 14 percent of the total population of New Mexico charter leaders, I recognize that a larger sample would offer more data.

It should be noted that ten of the fourteen participants identified as White or Caucasian and ten of the fourteen participants identified as women. I believe a more diverse sample of ethnicities and genders would have allowed for a deeper insight into charter leaders across New Mexico.

Lastly, this study constitutes new research for which there is no baseline information. With the increased number of charter schools, the amount of research has increased on their validity and impact on education. However, there is limited research on New Mexico charter leadership and their experiences during the pandemic.

Recommendations for Policy and Practice

The training and preparation for charter leaders is trial by fire. Many of the participants shared, that even as founders of their charter school, the burden of being a charter leader is immense. Some of the participants shared that now they have hired a principal or assistant to support the responsibilities charter leadership holds.

I recommend developing a succession plan for charter leadership. This plan would consist of two types of succession, planned continuity, and unplanned discontinuity and

continuity (Bickmore & Gawlik, 2017b). The planned continuity would be a defined succession plan designed to continue the work of a predecessor and the new leader would be continuing the innovative practices. This would include mentorship with the predecessor to support them in their first year as charter leadership. The unplanned discontinuity and continuity succession plan is a clear break from prior leadership but maintaining the continuity of the charter's mission. This plan would also include mentorship; however it would be from another successful charter leader. These succession plans should be required and included as part of the governance councils' responsibilities.

In some traditional school districts, mentorship programs are established for first year principals as well as tenured principals moving to a new school. Mentorship is not currently offered for charter leaders unless established by the governance council. Evidence shows that school leaders can benefit from a mentoring system throughout all stages of their careers (Malone, 2001). Studies show that charter school leaders have a higher turnover rate than traditional principals (Ni et al., 2015). I recommend authorizing districts, NM PED charter school division, and Public Charter Schools of New Mexico establish mentorship programs to support charter leaders.

Through the interviews and in my own experience, the lack of self-care was an area of emphasis for charter leaders especially during the pandemic. Charter leaders became the one responsible for everyone, but had little time to take care of themselves (Hayes et al., 2022; Parveen et al., 2022; Pollock, 2020). Charter schools are isolated from district support, so ensuring that charter leaders are provided support through

charter organizations or through policy developed by the charter's governance council should be established. Self-care considerations could include;

1. Offer training in mindfulness, self-care, and well-being for charter leaders.
2. Create spaces for informal networking to support the mental health of charter leaders.
3. Create support systems for charter leaders through mentoring and coaching that focus on self-care, health, and well-being.

The findings from this study demonstrated that charter leaders were in a state of crisis during the pandemic. Recent studies indicate that both traditional school leaders and charter leaders were not prepared for challenges presented by the COVID-19 pandemic (De Voto & Superfine, 2023; Vail, 2023). School leaders are dealing with devastating crises such as school shootings, environmental disruptions, and pandemics. They also deal with day-to-day crises such as flooding, water and electricity outages, and the death of a students or staff, to name a few. I recommend that higher education include crisis leadership as a part of the educational leadership preparation. Leadership preparation programs should rethink their programs to focus more on developing leadership competencies to manage a crisis.

At the school level, I recommend that leaders, revisit their pandemic crisis plans and document all the details and action steps from the past two years. These plans should be reviewed yearly however this task is more compliance than reflective. Although we hope that we do not have to experience this type of pandemic again, it would be advantageous to document the actions implemented. I would also recommend a disruption to learning plan that could include the process of students working from home

for an extended amount of time. This would include the process of distributing technology and internet access to students and families.

Based on the participants' responses, and my continued work with charter leaders in New Mexico; students, parents, teachers, and leaders continue to experience social and emotional issues as a result of the pandemic. This isolation has caused barriers to resocialization of individuals back into the school communities. A study conducted by an ad hoc committee from The Board on Children, Youth, and Families (BCYF) examined the long-term impact of COVID-19 pandemic on the well-being of children and families (Coker et al., 2023). The report documents findings, conclusions, and recommendations addressing the social, emotional, and educational needs, which align to this study. Evidence from the report shows an increase in the proportions of children with symptoms of depression and anxiety (2023). Children experienced some level of disruption, uncertainty, stress, and loss of connection to the community during the pandemic which caused increased the following:

1. Increases in children's dysregulated, internalizing, and externalizing behaviors and decreases in children's adaptive behavior and self-regulation skills;
2. Increases among adolescents and young adults in their level of concern about their present and future, more time spent feeling unhappy or depressed, lack of social connection, anxiety about the loss of a caregiver, and a desire for greater social and emotional support from their teachers and schools; and

3. Increases in parents' stress, household chaos, challenges in parents' mental health, and parent-child conflict (Coker et al., 2023, p. 3).

The recommendations from the BCYF study support my research recommendations to provide positive social and emotional development through evidence-based programs and interventions in charter schools. Funding will be needed to fully implement a social-emotional program as well as training to support teachers and support staff to implement.

Recommendations for Future Research

There is limited research in the area of charter school leadership, especially in New Mexico. I would recommend expanding this study to include teacher, student, families, and community perspectives on how charter leadership navigated through the pandemic. Through my interviews, the participants shared the positive feedback they received from teachers and parents on communication and overall navigation during the pandemic. A qualitative descriptive approach to gather the perspectives of stakeholders would provide charter leadership with insight on how they handle the pandemic would be valuable.

I also recommend this study be expanded to charter leaders nationwide. This could be a mixed methods study to gather quantitative and qualitative data on the experiences of charter leaders through the pandemic. Hearing other charter leaders' experiences and stories going through a crisis situation, future leaders will be able to learn from lived experiences rather than just theoretical frameworks on crisis leadership.

Conclusion

The data collected in this study supported the uniqueness of charter leadership as well as revealed the challenges face during the COVID-19 pandemic. The participants

were eager to tell their stories and share their personal and professional experiences. The pandemic created a situation like no other world-wide in education. The findings from this study suggest that leaders must be flexible, supportive, understanding, courageous, and humble especially when navigating through a crisis. Furthermore, the impact of COVID-19 on the mental health of charter leaders, educators, students, and families is unprecedented and the long-term impacts are still unknown. I hope that this study emphasized the passionate and committed work of charter leaders and their struggle navigating through a global pandemic. I hope that other charter leaders and educators will benefit from the lived experiences of New Mexico charter leaders through the COVID-19 pandemic.

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APPENDICES

Appendix A

Charter Leaders Screening Tool

⊕ PAGE TITLE

Hello and welcome to the NM Charter Leadership in COVID demographic survey.



This survey will take 1 to 3 minutes to complete and will be used to determine your eligibility for the next and final phase of research, which is a 60-minute Zoom interview. You will be notified of your eligibility status via email. Eligible participants will be provided a \$20 electronic Amazon gift card.

In the event more people than needed volunteer for this study, I will use the information from this questionnaire to help me increase the diversity of the study participants.

Thank you so much for your contribution!



Nadine Torres

Educational Leadership Ed.D. Candidate

1. Are you identified as the Executive Director (ED), Director, Head of School, or Head Administrator at your charter school?  0 


Yes

No

2. Were you employed as the ED, etc for the past 3 years? 2019-20, 2020-21, 2021-22  0 


Yes

No

3. Were you responsible for all COVID case reporting during those 3 years?  0

Yes

No


4. How do you identify?  0

Female

Male


Non-Binary

Prefer not to answer

5. What is the highest level of education you have completed?  0

Master's

Doctoral

6. In which area of NM are you located?  0


ABQ metro

Northern NM

Southern NM

Eastern NM


Western NM

7. Please specify how your school is authorized  0

District

State

8. If district authorized, indicate which district  0

9. Which of the following best describes how you identify?  0

White/Caucasian

Black/African American

Hispanic/Latino/Latinx

Asian/Asian American

American Indian/Alaska Native

Native Hawaiian/Other Pacific Islander

None of these

Prefer not to answer

10. Please provide your email address

 0

Appendix B

Interview Guide

Introductory Questions: Establishing rapport

Q1. Tell me briefly about your current position and why you decided to become an educator?

Personal educational background? Masters? EdD? In leadership?

Q2. How did you decide to become a charter school leader?

Q3. In your own words, how would you describe your overall philosophy of leadership? How does that philosophy present in your day-to-day work?

Q4. What instructional methods did your school use the past two years of the pandemic? Remote, Hybrid, full in person? Probe: What were the main reasons for deciding to use that method?

Key Interview Questions: Directly related to Pandemic

Q5. Thinking about the time frame before COVID-19, how would you describe your primary role in the school? Share your responsibilities as a charter leader – pre-pandemic

Q6. How would you describe your experience as a charter leader from March 2020 to June 2020?

Q7. How would you describe your experience as a charter leader from July 2020-June 2021?

Q8. How would you describe your experience as a charter leader from July 2021-June 2022?

Q9. As a charter leader, what would you describe as the most challenging aspect of leading during this pandemic? Examples or stories?

Q10. How has your work as a charter school leader been impacted by the pandemic?

Probe: Personal life?

Q13. How has the experience of leading during the pandemic changed your perspective or philosophy of leadership?

Appendix C
IRB Approval Letter



Date: 08/29/2022
Principal Investigator: Allison Borden
Protocol Number: [2208012134](#)
Protocol Title: Lived Experiences of New Mexico Charter Leaders Through the COVID-19 Pandemic

Submission Type: Initial

Committee Action: **APPROVAL**
Approval Date: 08/29/2022
Expiration Date:
Review Type: Minimal Risk
Risk Level: Minimal Risk
Project Status: Active - Open to Enrollment

The University of New Mexico Institutional Review Board has granted approval for the above referenced protocol. This approval is based on an acceptable risk/benefit ratio and a project design wherein the risks to participants have been minimized. **This project is not covered by UNM's Federalwide Assurance (FWA) and will not receive federal funding.**

This approval includes the following:

Recruitment Materials - Text for recruitment email - 2 Torres Recruitment Email v.07.20.22.docx

Recruitment Materials - Screening questionnaire - 3 Torres Screening Tool.pdf

Other - questions for qualitative interviews - 5 Torres Interview questions.docx

Scientific Review Form - scientific review form signed by department chair - 10 Torres Scientific Validity Form.pdf

CV/Resume - PI's CV - 8 Borden CV.pdf

CV/Resume - Student Investigator's Resume - 7 Torres Resume July 2022.pdf

Training/Certification - Student Investigator CITI Certificate - 6 Torres CITI.pdf

Protocol - Updated protocol - version 08.19.22 - 1 Torres Protocol v.08.19.22.docx

The IRB made the following determinations:

Informed consent must be obtained and documentation has been waived for this project. To obtain consent, use only approved consent document(s).

This determination applies only to the activities described in the submission and does not apply should any changes be made to this research. If changes are being considered, it is the responsibility of the Principal Investigator to submit an amendment to this project and receive IRB approval prior to implementing the changes. A change in the research may disqualify this research from the current review category. **If federal funding will be sought for this project, an amendment must be submitted so that it can be reviewed under relevant federal regulations.**

All reportable events must be promptly reported to the UNM IRB, including: unanticipated problems involving risks to participants or others, serious or unexpected adverse events, and noncompliance issues. All sponsor reporting requirements should also be followed.

If an expiration date is noted above, a continuing review or closure submission is due no later than 30 days before the expiration date. It is the responsibility of the Principal Investigator to apply for continuing review or closure and receive approval for the duration of this protocol. If the IRB approval for this protocol expires, all research related activities must stop and further action will be required by the IRB.

Please use the appropriate reporting forms and procedures to request amendments, continuing review, closure, and reporting of events for this protocol. Refer to the OIRB website for forms and guidance on submissions.

Note that all IRB records must be retained for a minimum of three years after closure.

Appendix D

Coded Interview

Interviewer: So, if you can tell me briefly about your current position, and why you decided to become an educator

ANA: Okay, so my current position is the executive director at ABC Charter High school. I actually took a non-traditional path in my admin licensing. I started out as a clinical, license social worker and I started doing some more administrative work. I became the dean of students at the DEF charter school, and during that time, as you work in in the school setting and work in education, you really start seeing the inequities, you start seeing a lot of work that needs to be done, and how you can advance that work, and often times taking leadership spaces is the way to do it. So, I worked on getting my level 3 B admin license, and then once I did that, the position at ABC Charter High School for the Executive Director role had opened up and I applied and here. It's a bit of a nontraditional path, I really appreciate kind of having that mindset through a clinical lens especially in working with our populations that we work with. I'm really taking on that kind of unique holistic role around students support and advocating for their needs.

Interviewer: What attracted you to become the Charter school leader at your school?

ANA: I think what attracted me was the population (3). You know I am a Chicana and I'm also Native American. I was born and raised in the South valley and growing up in that area, going to East Jose for my elementary school years. Talk about the inequities in education. Of course, at the time when I was young, I didn't know, but when I started, you know, growing up, and then, of course, working in an APS, you can see you can see the differences, in spaces you know, what the what the playground looks like in the South

Valley versus what the playgrounds look like in the Upper East heights. So, I think what really motivated me was being able to give back to my community being, you know, working with the student population that I know, you know, being able to speak the language, and be connected with students in a very in a very kind of engaging way.

Interviewer: How would you describe your overall philosophy of leadership?

ANA: So, I would say overall my philosophy of leadership is really being engaging, interactive (12, 13), and cohesive. There's two particular statements that I make at the school that's connected with our vision and mission, and that is "Juntos Podemos" – "Together we Can" and "Somos Familia" – We are a Family" and I really truly believe in that. I believe in leadership being collective (12). I believe in being able to hear others' perspectives, opinions, and take that into consideration (9). Being able to work collectively and collaboratively (12) towards decision-making that advances student outcomes as opposed to it being this top, down you will do this as I say, kind of kind of way. I will say, though there are days.

Interviewer: So how does that philosophy present in your day-to-day work? So, if I were to come in, what would it sound like, feel like, look like at your school?

ANA: So, first and foremost as a school. I have a 3-pillar model, so I'm the executive director, but I also have what I consider kind of 3 forward-facing principles. I have a principle of curriculum, principle of community engagement (9), and a principle of student support (13). So, it's that holistic approach, right, to that 360-degree approach to student needs. When we meet together, we meet together as a team, and then the team meets together during PLCs in our professional development every Friday. So, our staff

meets from 1:15 to 4:15 every single Friday. So, we have a really strong kind of **cohesive connection (12)**, and the idea during that time is, it's we're project-based learning. So, it's a little bit different. Our teachers are actually instructors that design projects, so they need to collaborate with each other. Asking, "How are we meeting standards and benchmarks in our courses? How are we addressing English language learners? How are we addressing special education scaffolding needs? So, it's that **collective process (9, 12)**, kind of that familial process, of engaging students towards that growth and development. The advisors function almost as a parent, like a pseudo parent right so they're overseeing their cohort of 15 to maybe 20 students and that teacher must know everything right. What is that student's number? What's their family situation? What's their attendance? So that we're making sure that we're connecting with every single student.

Interviewer: Awesome. Thank you. So, thinking about the timeframe before COVID, I'd like for you to describe your primary role and responsibilities in the school. So, if you were to explain to someone that does not know what a charter leader does. What would that look like as far as your roles and responsibility?

ANA: And this is Pre COVID? Okay, So, I have a unique situation in that I came in during that COVID year, so I was here about 6 months, and then we closed down in March, so I started on August of 2019, and then by 2020 March we were closed down. So, during that timeframe, as a charter leader, I always say that the only way that I can compare it to is, I think, about the towers at APS and I think about the East tower and the west tower. In the east tower, it has the maintenance and operations. Title I, Title II Title III, finance department. That's the charter leader in any in any charter school. **You function as the superintendent;** you function as the principal. You function as

maintenance and operations. You name it whatever happens at the school you're it. I think about that being the onus of responsibility, and then, of course, the fiduciary responsibility over the finances. Managing all operations of the school, and making sure that every single entity, right, every single component of the school is functioning and the way that it needs to function. That's aligning with your vision, your mission (6), and connected and grounded to who you are as a school and organization. It's a lot. There's a lot of components, logistics, where you think you will focus may shift from 1 min to the next. So that was a lot of the work that happened, I think, at the beginning I had the unique, the unique responsibility (8) of being a newbie into the setting and being not only grounded in what had been exist in existence, prior to me. But what I needed to do to sort of gel and shift things to make sure that it was that I was in coming in and overthrowing everything. But so, I was being careful and cautious about that. But I was also being mindful of the things that really needed some support and extra nurturing (13, 12). So yeah, so that's kind of what I was thinking in terms of, or what I was doing pre COVID.

Interviewer: Okay, so then March 13, 2020 happens, and we all are sent home. I'd like for you to share your experience of being the charter leader for that that time period from March 13th to June 2020.

ANA: Okay, so it was interesting, because so I'll go back to talk, talking a little bit about how we're a project-based instruction, right? So, we don't have a traditional model of sit and get. It's all hands on, the design and process of the courses is embedded with student involvement, with community partner involvement, and then of course, with staff. So, there's a lot of innovative practice in that, just naturally. So, when we went into COVID closure one of the things that we knew we needed to do was make sure that students

didn't sort of skip a beat in terms of accessing curriculum, accessing resources and support, and accessing community partnerships. So, we already used Google classroom pretty regularly, because that's where students were connecting in, submitting documents, doing PowerPoint slides, and sending those in. So, we didn't really have a huge impact in that way. Now that one thing that we needed to do, a huge shift on was our presentations of learning. So, we have exhibitions, mini exhibitions, and then final exhibitions. So that's their midterm and final exam. Essentially what we did was we created a "Somos Familia" website. This website had all of the students posting. So, each class had a section of the website, and on that website, each student presented their exhibitions on the website. So, we had a certain day where everybody came in and presented, and we recorded it, and then they came into zoom, I should say they did. The Zoom Day community partners were able to participate, and the community partners that were not able to be there during that time could go back and see the recording and we had commentary on the side. So, you know, you're able to see, the feedback, you know, really great knowledge acquisition or here's what I'd love to hear more about or love, to see some growth areas in these spaces, so we were able to kind of keep the integrity of what exhibitions were through this virtual lens. It was really exciting. So, we created a whole website, you know, with our with our presentations of learning that website then led to another website for community engagement and another website for student support, So students can access those websites for resources information they can schedule an appointment with any one of our student support leads our social workers, and then, of course, community engagement partnerships. So, we kept. We kept a lot of stuff as much as possible. I mean. There were challenges, and we had to be creative. The practical

placements and internships were tough because kiddos couldn't be on site. So, we worked with the area of aging and long-term services, and our students did care calls. So, our students were calling the elderly community and connecting in and getting them set up for their COVID shots, helping them register because some of them, you know, we're not using technology or you know, not confident using technology, So our students were doing those care calls. So, it's actually, I mean when I look at that at that time frame. I remember hearing everybody talking about how difficult it was, and we got to give the students grace. And this is really challenging (3, 8), and we've got to support our staff, and we were doing those things. I was being very intentional about opening up space for staff to come together (9, 12), just to connect almost like our happy hour, so to speak, just to kind of be together but there was there was some pretty cool things that were happening and our students, were engaging I think you know, we did lose some students right who were not engaging and connecting. That was probably the toughest but the ones that had stayed connected. And really maintain that timeframe via Zoom and kind of the Google classroom sessions that was actually really positive.

Interviewer: How would you say leading through that time with your staff?

ANA: So, the experience was a little of double edge sword. So there were spaces where I think you know, everybody just sort of kicked it into high gear, and one of the things that I had to keep reminding staff about is if we if we feel challenged (9, 12) by this right because there's a lot of fear involved in what was happening there was a lot of concern of you know people losing family members that you know, was really challenging. There, were, you know, concerns of students, family members losing jobs. So, we're kiddos had to step into spaces to help work and help offset the cost. So, what I told staff is, we have

to remember that if we're feeling a certain way, our students are probably feeling 10 times worse than we feel. So, I'm not being dismissive of our emotions and what we're going through but it's incredibly important that we maintain consistency. Make sure you're on time in your Google classrooms and your Google meets. Make sure you're holding those spaces. The open office hour sessions because our students need us more than ever. So stay focused and grounded, and when you need that space, if you need someone to talk to, we have, the Lead Team and other spaces are open for us, as the adults in in that timeframe, so I mean, you know, some stuff, most of the staff, are really just kicking it into high gear here and there you know you have some offsets, and as lead team, you know, we're in those spaces and helping support the teacher and making sure that they get the guidance and support that they need (13, 12). But yeah, and since I wasn't having to deal kind of with the day to day you know hustle and bustle of the school day, right like dealing with a you know, student situation or behavior, whatever you know all the stuff that comes up in the day. I immersed myself into writing grants. So that year we secured a little over half a 1 million dollars in grants. So, it was a great year for funding, and it really helped offset since we're working on getting a building as well.

Interviewer: When we move into the next school year, July, 2020-2021, was it that same setup? The Google classroom, the Google meets and Zoom? How was turnover? How was the experience? And then we were told, we're going stay remote, and then in March they said everybody could come back. Did you continue with the work that you were doing with the presentations?

ANA: Yeah, we did. We continued it. We continued, all of that. In fact, the year prior was our first year. It was during COVID that we had our first graduating class of

community health workers. So we continued that work as we wanted to make sure that we maintain that dual credit opportunity for students it started becoming a little bit more difficult because I think what everybody thought was this is only going to be for a short period of time let's do it let's move let's just hustle started becoming a whole lot longer, and not as motivating and not as exciting, and you know, a little stressful so that that became a little bit more challenging, and I think, as we came back we started seeing staff sort of getting into their own into their own way, about things that was probably a tougher year for us, and we had a lot of staff who just think have some jaded mentality about education in general and I think people liked being home and didn't want to have to return to work, and it's like we have to work guys, like we're back. And so, I we did have some turnover that year.

Interviewer: So that March, or that February when they said did, you have teachers that just didn't want to come back?

ANA: Well, I mean they came back, but it was like, you know, it was just it wasn't the same. There just wasn't that level of motivation there was a lot of push back on things. And so, I remember that was the year that I had some pretty hard discussions with Staff about, you know I need you to want to be here (3). I want you to know that I want you to want to be in the space and I know the potential you have (12). I think, I don't have the solid answer, but I've made some guesses along the course of the way, I was a new leader coming into 2019. We all just sort of buckled down right locked arms and did what we needed to do. The leadership style that had happened before me, and I didn't really know her very well but the style that she had was more of "let people did what they wanted to do", and they handled everything on their own. And my concern with that, I think there's

some beauty in that, **I don't want to micromanage at all (8)**. That's not my interest. I don't have time to do that. But what I do like to have happen is when great things are happening, for example, in a senior classroom, that the freshman and the sophomore and juniors get to engage in that, so that they can learn and there's connectivity. **So, there was this lack of connectivity that was happening** that there was this kind of cool thing that happened in senior class, but nobody really knew about it. Seniors were just barely learning how to do a resume and I'm like that should be happening at Freshman Year. And so, I think the practices that had been embedded were, “no, we do what we want, and we do it on our own”, and “we don't want to talk to the others”. And I told **them that's got a shift, that's got to change**. Some of them were like, Let's do it. I'm with you on that, and some of them are like Nope, I don't want to do what I want, and so that's those are the tougher conversations we had at that point.

Interviewer: And how do you think COVID impacted that year? Because this is your second year. You know, you like that first year. You're kind of in a honeymoon period. But then, like that second year, how do you think the pandemic impacted your ability to build that connectivity?

ANA: You know that's where I'm not sure like I can't pinpoint it one way or the other to say, oh, it was because of COVID that we got to do this or not. I think COVID made it a little bit sneakier where things could happen, and I couldn't necessarily see things in the same way. **And I remember thinking, man, I can't wait till we get back in the building, so I can actually see how all this looks as opposed to you know hearing about it, and all of a sudden it's there and it's like well, what happened and who was engaged and who was participating in this so I think that I think that kind of getting back into the space created**

that definitive, "Oh, this is what we need to do and I don't get to go rogue". We don't get to go rogue.

Interviewer: So, when we were all told that we could come back, what did your school decide to do, and how did that look in March 2021?

ANA: So, we did. Yeah, so we came back, and we did virtual option. That was a little tricky, because our teachers were having to sort of teach in person and zoom, you know, in the classroom. We did some of the asynchronous opportunities like through Acellus, the credit recovery program. **It was interesting, through COVID if felt like we had 10 different schools (7).** We have a day program, we have our re- engagement program, then we have a day program in-person, day program via zoom, and re- engagement via zoom. So, we had all of these courses and classes happening. **I felt like I was running and managing like 10 different schools.** How do we take in attendance? And oh, do we have to test? Do we not have to test? Oh, now we're getting grace during the test. I always tell people that I feel like this year is my first year, right? Because when I was in the thick of it, when I started in 2019, the testing had already been ordered, and all of that was done. So, I knew, Okay, we're doing Renaissance, we're doing reading and math. We did Read 180. Was there a NMASR test? Did that happen right then? We went into this whole, don't worry about it, you don't need testing, it's all grace right. We don't need a worry about it. So, I had come from an elementary/middle school predominantly, and I knew about all the elementary/middle testing but not the high school. So, this is almost my first year of like, Okay, this is what we're doing. I feel silly that it's my fourth year, but it feels like my first. Well, the testing piece was a huge like coming back into that space.

So, coming back, we did full masks, because we're a health focused school, I said, look we're going to do things as you would if you were in a hospital. If you guys are doing a practical placement or internship at any clinic you are going to have to wear masks. So, we're going to practice that now. We had our pattern, of which way to walk the one-way path. Eating all happened outside, drinking water, we'd have breaks in our block schedule, go outside. We had the PMG services do the PCR testing that happened on site. They would come every Friday to do testing. We just sort of did what we needed to. But it was tough, because we had so many students that were partially here, students online. The dynamic of the school was just so different during that time.

Interviewer: So now onto 21-22, we're in that school year where you know everyone's back. We've got toolkits. You have an option for students to stay virtual and what would you say was the percentage of students that actually came back in person compared to the students that stay virtual.

ANA: This year we had a large percentage of students coming back, but we pushed it that way. We said that we were wanting everybody back in person, and that only special exceptions would be accepted to do virtual. So, we actually have the majority of our students here at the school.

Interviewer: And what was it last year?

ANA: Well, last year was a lot. Last year, we probably had 60 students on campus. Maybe on a good day we push 80, but there were hardly any students on campus. It felt really, really slim, and everybody else was via zoom.

Interviewer: So, describe your experience with having those 60-80 students. What was your experience as a leader with having students on campus and staff on campus? Did you have some staff off campus, or did you have most of the staff on campus during the 21-22 school?

ANA: Everybody was on campus, and if a teacher was sick, and or they needed to be out, and they could get on zoom, they would do their classes via zoom from home. So, we had stuff like that happen where teachers would work from home, but they would still hold their classes, you know. It's interesting, because I think that what really creates a school's environment is the social community right? And so, it was really hard to get students connected and really increase enrollment, although we did really fabulous that year with enrollment which was surprising even though we had a whole lot of students virtual we had 240 students. So that was fantastic, but it was hard to get the same who were here to see I swear it's not like this. There's a whole lot more usually happens, and then, you know, students on zoom to have their screen on, and things like that. So, but it took a whole lot more work from staff around, making sure that they were calling home, checking on the students, doing check-ins at the beginning of class especially with students that were virtual. How are you doing? Are you Okay? A lot of our students, but it was the year that we started coming back in 2021 that we started coming back in that a lot of our students didn't want to come back in because they now shifted their schedule to work during the day. Because a lot of them had to had to step in. Their parents had been laid off. They could, you know, were needing to earn money. So, they during COVID, started working, and then they would come in for re engagement. So, when it was time to come back in person. A lot of those students continued working and said, "Well miss,

you know, I am not going to come in. I've got to work". So, then we had to work with them to shift their schedule. So, in response to that, what we did was we wrote 2 grants, and both of them pay students for their practical placements and internships. Because what I wanted to do, and that's what our students were saying. Well, we can't, you know. I know it'd be a great opportunity for me to work at UNMH, but I'm not getting paid there, and I've got to go work at chick-fil-a because I get a check. So, in response to that, we said, "Okay, how do we pay students to do what is going to give them those post-secondary opportunities?" So that was the response to the COVID kind of shift that we saw happen when we started coming back in person. This year our implementation of the innovation grant and our New Mexico at a school time Grant to start paying kits for internships and placements.

Interviewer: So, I want to make sure I understand. When you said you had an in-person program as well as a re- engagement program. Is the re-engagement program on campus or virtual. Tell me a little bit of that. Is that more asynchronous learning?

ANA: So yeah, that one is tricky. So, our Re engagement class, with the way that I wanted it is that it literally mirrors the day program. So, it's a full day program, Project Courses, X Block, and advisory all of that right. The success planning course should mirror the day program when we went into school closures. There was no way that we could do the same kind of work that we were doing in the day. So, what we did was we pushed that all to an Acellus classes. So, all of our students were enrolled in Acellus.

That gave them the flexibility to do asynchronous or in person zoom. We'd have an open Zoom Meeting every night, and students would just pop into the Zoom Meeting and ask for help. We could also see them on Acellus and how they were doing and check in. So

then, when we came back the way it was, students were doing both. So, some of them were via zoom, and then there were courses in Acellus but again the integrity wasn't there. So, there was mostly Acellus that year.

We've pushed it all back now to being project courses, instruction students on site in person, and again, we do have some students asynchronous but again they have to be followed really closely.

Interviewer: With the 60 to 80 students that you had last year coming in? How was the experience? Give me some more insight about your PMG, your test to stay. Your experiences about how you dealt with COVID for students and staff.

ANA: We functioned and ran it as though we were a practice in a hospital setting. So, we took high level precautions that wouldn't have probably maybe happened in a traditional school setting. So, it was a little bit more intense, and the teachers knew, and everybody knew we don't take masks off. We all have to follow protocol. Teachers and everybody had to get, I think, was the tested weekly if you were not vaccinated. We also had PMG services and they would come on site, and they would just set up shop once a week, or if we needed them to come more often, they could. But we had them set designated for once a week. So, any teacher, anybody who was not vaccinated, who had to do that weekly testing boom, it was done there. They didn't have to go somewhere. Then anybody who just wanted to get tested before the weekend could feel good about getting a negative test. We actually, had a pretty good run I mean we had some staff who would have COVID, and then they would stay home, and we just followed all protocol according to the toolkit. Of course, that changed probably a 1 million times, like what toolkit number are we on this week? So yeah, we just had to keep following the protocol

of the toolkit. We kept everybody off site, and you know it was easy to do, because we said, “Look, staff Member, if you're feeling okay, or you're feeling good. Then can we come back?” “No”, we're going follow the procedure, follow the protocol, but just put your zoom on, and you'll have class right there. So, students who were on site would still go to the classroom but now their teacher was via zoom. **So yeah. It was tricky. So, you know it was a lot of logistical planning day to day, maneuvering, lead team stepping into spaces, stepping in as a teacher (7).** When you needed to teachers helping support each other a lot. There was a lot of that song and dance.

Interviewer: So, what would you describe as the most challenging aspect of leading during the pandemic?

ANA: You know it's funny, because I remember when we'd get into our superintendent calls, and you know conversations that would happen. People would say, gosh, I just can't wait till we get back to normal, and I only had about 6 months of what would be considered normal. So as a leader right in that space, **I didn't know what normal really meant (8).** I was used to having to write up for the plans for a safe return to in-person school, how are we addressing PPE, are we purchasing MERV 13 filtration system, etc. All of that stuff became my norm. So, it was a little bit different for me in that regard because it's what I had been used to, having to design 10 different classes. I had a little taste, having been in education for years. I knew what the traditional leader looked like. **What I knew during COVID, was a constant, “This is due, and do this now, turn this in, and submit this.”** “How are you doing this? What does this look like? What's your percentage of this?” That became very normal to me. So, I will speak to it now, I see that difference. I see the difference of the compliance and mandates. There's not that high

level, almost. Gosh! It felt like it was something bi-weekly of things that were due.

There was reporting that needed to be done. That was extensive. And yeah, it was just a lot of managing and maneuvering. I did find it stressful right now because there was this hole where I was ready to be not this needs to get done. We need to make sure this is good. I don't care if students aren't here. We need to make sure they're testing is ready to go. We can do PSAT's virtual. How do we do this right? Working with CNM. Whatever we needed to do. And so, then it was like, no, no, don't worry about it. We're going give grace. Don't worry. Colleges and universities aren't even going ask for it anymore. So that was this kind of weird, like, I'm ready. But okay, I just need to hang tight (3, 7). And so, then this year, I feel like great. I get to share and highlight the wonderful things that are happening.

You know, we started with only having financial literacy as our dual credit program, and certified nursing. We had moved from that to now having EMT first responder, we have community health workers. We had now had 2 cohorts with graduate community health workers. We have a pharmacy tech; we continue to build on all of these programs. So, I was ready to highlight all of these beautiful things. Then we just get reamed for our baseline data of testing. Oh, now you're ready, oh, okay, I was ready 3 years ago, and you guys told me to hang tight, and now you're on my tail about not having the highest level when I get it. Our scores aren't always reflective of our student knowledge. We know that.

Interviewer: How has your work as a charter leader been impacted by the pandemic, not only professionally but personally.

ANA: But I think really taking a really deep dive, an intentional look at our student needs, and really thinking about things in a very different way. Right. So, I know as educators, we have that onus of responsibility to make sure that we're showing growth and progress when it comes to curriculum and when it comes to testing and all of those things and I truly and wholeheartedly believe in that but I also believe that when we think about the impacts that our students are enduring on a regular basis. It's easy to forget what they're experiencing and the needs from a compliance level as educational leaders, because we get so blinded (6) We get so focused in of this is the data we need. This is what we need to focus on, and sometimes that isn't really where students grow and evolve and become strong citizens. So, I think this has given me that opportunity to sort of really take a step back and have that time to think about. These are what students experience during this time, and most importantly, the level of resilience that these kiddos have. You know, I've always known that in some shape or form, being a social worker. But man experiencing a pandemic, and the things that our students went through, you know they're already struggling with high-level poverty, and you know all of the all of the things that they that they have to deal with. From a day to day, basis, and to have a pandemic thrown on top of it. It makes you really think about okay, what are priorities? What are our priorities as educational leaders? And where can we be thinking differently about how we think about students? Progressing student outcomes. What does that truly mean right when they leave here? What tools in their tool bag do I want to make sure they have? Yeah, I want them to have those academic tool bags, but I also want them to be able to be successful in critical thinking. I want them to be able to be strong as young leaders, to be

able to advocate for themselves, and to speak up. Those are priorities for me that I think were highlighted in COVID.

Interviewer: What kind of differences did you see in the students when they returned last year?

ANA: Students, yeah, well, okay. So again, this is the unique situation I was in. Right when I came, I'll be honest with you, it was intense here at the school. The students ran the show. There was graffiti. I mean it was just nonsense. I was literally walking around with that goof off spray to get that done. I was calling to say, Okay, what is this gang like? What is this? I remember just that first year I met with students during, what we call rounds, which is our assemblies. It's kind of like the grand pediatric rounds that they have at the hospital. So, we kind of follow suit with that, and I took pictures of all of the things that I needed to fix, and I took pictures of the checks that I had to pay for them, and right before I had a Pizza party for the students we had pizza, salad, and soft drinks, the whole nine yards. So that following week I showed them the checks for all the things I had to fix; the graffiti, the bathrooms for the stuff thrown in the toilets and clogged and you know all the issues. I said, "This is what I had to spend on that". I said, "This is our school, this isn't my school. This is your home, away from home, you are here six and a half hours a day." I said, "This is what I had to spend when Roto-Rooter had to come out to fix the toilets. This is what I spent on pizza for the pizza party at the park. What do you all prefer? What would you like to do? Because it's our home." You tell me what you want me to spend the money on, because I just have the responsibility of where to spend things to make sure that our home is running correctly (9, 12, 13). You tell me what you want to, spend it on, and it's shifted but it took some time. It was crazy here. During the

closure I made sure to contact the students who were not getting involved, students who we're doing the things that they shouldn't be doing, engaging in practices that they shouldn't be engaging in or having some struggles. Those are the ones you need to be closest to. Those are the ones I wanted to make sure we were connected to because those are the kiddos that need us most right now. They are the ones that you say, "Oh, thank goodness, they're out of my hair." But they are the ones that you never do that with. You've got to stay connected (9), so that was what we did during that time.

So, when we came back, I was like, "OH!" What's going happen? They were so excited to be back in person. They were excited about being able to be connected to the school again, that it was such a different environment. A lot of the students had even come to me, it was interesting, they did tell me, they said, Miss, you really change things here, and you changed it for the better. And I've had a few students tell me that, so wasn't just one. I was like write it off right. It was a few students, and some of my toughest kiddos that were the toughest with me had told me that. So, I said, Okay, we got things. We got things somewhat in a good space. So that was the one dynamic of the students who I don't think they didn't know what they had until they lost it. So, we had that group of kiddos coming back, and then I was ready. I was ready when we came back in person that we were going hit the ground running and we were going be tough. We are managing day to day behaviors. We're making sure that we're supporting students that you know we're not just letting kiddos run amok. Everything was social, emotional behavior. When we came back everything was focused on SEL as much as possible, so it wasn't until this kind of past year. Now we've been focused on curriculum.

Interviewer: How has the experience of leading through a pandemic either changed or supported your perspective or philosophy on leadership?

ANA: I think it's supported my philosophy, having that clinical social work lens, and really understanding the **importance of social emotional learning**. Making sure that we're supporting student needs, that holistic approach, it's always been kind of my **guiding passion (6)**. I think, coming out of the coming out of the pandemic, I've been so incredibly excited about hearing more NMPED discussions nationally, not even just from NM but just nationally talking about the importance of **social emotional learning**. People really being connected to, and reflecting on the **importance of mental health, mental well-being**, that was something that I've always advocated for and always talked about. But it was kinda like, okay, okay. But you know, that's ancillary, that's secondary, right? And so, it was the first time that shift had happened. So that was really exciting. To be a leader during that time because I was like, you know, I was always at the front of the lines, rallying for that. So that was that was exciting. But I'll be honest with you. You know it's interesting, because, as you know, in this work, **it's tough (7)**, and you know this, there are times where I really want to continue to lead, in that space where there's that **collaborative discussion (9, 12)**. Especially with the adults. Right? Just talking about adults. Collaborative discussions and connection around how are you feeling and how are you doing. Let's make the **right decisions because of the right thing (3, 6)** to do, not because I'm telling you that you have to do them. But man, it's tough, and sometimes I see kindness being taken as weakness. I've shifted a little bit in that, and so I want to continue to keep that, you know, that clinical social work hat mindset but it's a challenge. It's a challenge, and there are times when I can feel like I'm losing that.

Legend

Fear
Stress
Change
SEL
Mission Focused
Communication
Superintendent
All encompassing
Discipline/Behaviors
Supportive
Innovative practices
COVID reporting

Different colored highlighted text designates the above themes within the text.

Red font corresponds to Situational Leadership characteristics and behaviors and the numbers correspond to the number of participants who demonstrated those traits.

Courage (3)
Clear Vision (6)
Relational (9)
Value Others (12)
Humility (8)
Flexible (7)
Supporting (13)
Understanding (11)
Coaching (5)
Building Capacity (5)
Integrity (3)
Listening (2)