Building and Merging: A Case Study of the Impact of a School Merger on Leadership, Actions, and Teacher Perceptions at Two Suburban Elementary Schools

by

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DISSERTATION ABSTRACT

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Title: **Building and Merging: A Case Study of the Impact of a School Merger on Leadership, Actions, and Teacher Perceptions at Two Suburban Elementary Schools**

School mergers represent a complex and underexplored form of organizational change, particularly when two schools of equal status are combined rather than one being absorbed into another. This qualitative case study examines the merger of two elementary schools into a single unified institution and its impact on teacher perceptions of trust, teacher influence, and collaborative practices. The purpose of this study is to understand how leadership actions, communication systems, and collaborative structures influence teacher experiences during and after a school merger.

The study is situated in a suburban elementary school in the Midwestern United States and focuses on a merger that occurred during the COVID-19 pandemic. Data sources include staff surveys and organizational artifacts collected over a two-year period. A qualitative case study design, informed by participatory action research and critical discourse analysis, is used to examine how leadership practices and organizational systems shaped staff perceptions throughout the merger process.

Findings from this study are intended to provide insight into how school leaders can effectively support teachers during periods of significant organizational change. The study contributes to the limited body of research on school mergers by identifying leadership practices and systems that promote trust, collaboration, and teacher capacity in newly formed school environments. Implications for practice include the development of more intentional communication structures, collaborative systems, and leadership approaches to guide future school mergers.

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Sarah Block and Julie Alonzo; thank you, thank you, thank you!. Your shoulders must hurt from carrying me to the finish line.

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CHAPTER I

INTRODUCTION

Educational systems are continuously evolving in response to demographic shifts, resource constraints, and policy changes. One increasingly utilized strategy for district adaptation is the consolidation or merger of schools. Although school consolidation has been examined in prior literature, most documented cases involve the closure of one school and the absorption of its students and staff into an existing institution (see, for example, Dee & Rapport, 2018; and Howley et al., 2018). In contrast, significantly less is known about *true mergers*, in which two independent schools combine to form an entirely new organizational entity. This gap in the literature presents a challenge for educational leaders tasked with navigating such transitions.

The present study is situated within a suburban elementary school district in the Midwest that undertook a rare form of school restructuring: the merger of two elementary schools into a single, newly unified institution. To preserve the identity of the school and district, the researched school has been given the pseudonym “Forest” Elementary and will be referred to as such for the purposes of this study. Unlike traditional consolidations, this merger did not involve one school subsuming another. Instead, two schools of equal standing, previously separated physically by only a set of locked doors, were combined to form a third, entirely new organizational structure. Historically, one building served students with even-numbered addresses while the other served students with odd-numbered addresses, reinforcing a division that was both structural and cultural. The merger required not only the integration of systems and operations, but also the deliberate construction of a shared identity among staff and stakeholders.

The complexity of this process was compounded by its timing. The merger occurred during the COVID-19 pandemic, when much of schooling was conducted remotely. As a result,

many foundational aspects of organizational change, such as relationship-building, collaboration, and communication, had to be facilitated virtually. This introduced both constraints and opportunities. While remote contexts created barriers to organic interaction and informal collaboration, they also necessitated intentional communication structures and innovative approaches to team building. In this context, the district proceeded with the merger despite the absence of a clearly established framework to guide the process. Consequently, the process relied heavily on research-informed practices related to leadership, teacher capacity, and organizational change, while simultaneously generating new insights into the merger process through lived experience. Figure 1 provides an overview of the structural changes that took place during the merger.

Problem Statement

Although educational leadership literature provides substantial guidance on school improvement, communication systems, and teacher leadership, there remains a critical gap in understanding how these elements function within the context of a true school merger. Existing research does not adequately address how school leaders can effectively merge two distinct school cultures into a cohesive and high-functioning organization, nor does it provide a roadmap for supporting staff throughout such a transition.

The problem addressed in this study is the lack of empirical and practical guidance on how to conduct a school merger in ways that positively affect staff perceptions, particularly regarding trust, teacher influence, and collaborative practices. As school districts increasingly face pressures related to enrollment shifts and resource allocation, mergers may become more common, heightening the importance of understanding how to implement such processes effectively.

Figure 1
Structural Changes: Pre- and Post-Merger Organizational Conditions at Forest Elementary

Domain	Pre-Merger (2 Buildings)	Post-Merger (1 Building)	Intended Outcome
Leadership Structure	Team leaders advocating for individual teams	School Improvement Leaders representing all staff and students	Increase shared leadership and collective responsibility
Teacher Collaboration	Weekly planning; classroom teachers only	Twice weekly planning; integrated with support staff and across roles	Increase collaboration and alignment across teams
Professional Development	Occurred on SIP days, institute days, or external training	Embedded daily professional development with instructional coaches, in addition to SIP and institute days	Build continuous teacher capacity and instructional improvement
Teacher Voice	Input through surveys and team leaders	All staff members part of school improvement teams; teacher-led professional development and choice in sessions	Increase teacher influence and distributed leadership
Instructional Alignment	Dual language and mono-language programs operated separately	Integrated planning and collaboration between dual and mono-language teachers	Improve coherence and consistency of instruction
Organizational Identity	Two separate school identities	Unified school vision emphasizing SEL, autonomy and trust, standards-driven instruction, efficiency, and meeting student needs	Build a cohesive school culture
School Rating	Unsatisfactory	Commendable	Improve overall school performance and student outcomes

Purpose of the Study

The purpose of this qualitative case study is to examine how merging two elementary schools into a single institution affects teachers' perceptions of trust, teacher influence, and collaborative practices. Additionally, the study seeks to identify the leadership actions and support systems that facilitate a successful merger. It is my hope that this study will contribute to

the development of a practical, research-informed framework to guide school leaders in future merger contexts. By analyzing qualitative data, including staff surveys and Illinois 5essentials Survey data, this study provides a human-based understanding of the merger process and its outcomes. Limited research has examined how communication systems, collaborative structures, and leadership practices collectively influence teacher experiences and student outcomes in newly merged schools. This study seeks to address this gap by examining these relationships within the context of an elementary school merger, contributing to a more comprehensive understanding of how organizational systems and leadership practices shape educational outcomes during periods of significant change. This study examines how merging two elementary schools into a single institution affects teachers' perceptions of trust, teacher influence, and collaborative practices. In this process, the study also hopes to identify the leadership actions and support systems that facilitate a successful merger

This study is significant because it contributes to a limited body of knowledge by examining a rare case of a true school merger and its impact on teachers. Specifically, it seeks to identify leadership practices and support systems that influence teachers' well-being, capacity, and perceptions during and after the merger process. The findings have the potential to inform future school leaders, policymakers, and districts facing similar restructuring decisions. They may also be relevant for school leaders attempting to guide their schools through other dramatic changes, such as a substantial change in staffing or student demographics.

Definition of Terms

Collective Teacher Efficacy: The shared belief among teachers that they can positively impact student learning and achievement through their collective actions, regardless of external factors (Hattie, 2008).

Collaborative Practices: Structured and informal opportunities for educators to work together to improve instructional practices, analyze data, and support student learning, including professional learning communities (PLCs) and team-based planning.

Illinois 5Essentials Survey: A statewide survey administered to teachers and students in Illinois that measures five key indicators of effective schools: effective leaders, collaborative teachers, involved families, supportive environment, and ambitious instruction. In this study, the survey is used to measure changes in teacher perceptions before and after the school merger.

School Merger: The process of combining two existing schools into a single organizational entity. In this study, the term refers specifically to a *true merger*, in which two schools of equal status are unified to form a new school, rather than one school being absorbed into another.

Teacher Capacity: The knowledge, skills, and professional abilities of teachers to effectively deliver instruction and support student learning, often enhanced through professional development, collaboration, and instructional support.

Teacher Influence: The extent to which teachers perceive that they have a meaningful role in decision-making processes within the school, including input on instructional practices, school policies, and organizational structures.

Trust: The level of confidence and reliability perceived among colleagues and between teachers and school leadership, which supports open communication, collaboration, and organizational effectiveness.

Teacher Perceptions: Teachers' beliefs, attitudes, and interpretations of their work environment, including their sense of trust, influence, collaboration, and overall well-being.

Research Questions

The problem addressed in this study is the lack of empirical and practical guidance on how to effectively merge two schools into a single, unified institution in a way that positively impacts staff perceptions. To address this problem and fulfill the study's purpose, the following research questions guide this qualitative study:

Research Questions

R1. How did building leaders utilize data to inform the development and implementation of the school merger?

R2. How were leadership actions and systems implemented to support trust, teacher influence, and collaborative practices during the merger?

R3. To what extent did teachers' perceptions of trust change from before the merger to after the merger?

R4. To what extent did teachers' perceptions of teacher influence change from before the merger to after the merger?

R5. To what extent did teachers' perceptions of collaborative practices change from before the merger to after the merger?

Summary and Organization of the Remainder of the Paper

This chapter introduced the context and foundation for the present study by examining the growing need for research on school mergers, particularly those involving the unification of two schools into a single, newly formed entity. The background highlighted the unique nature of this study, including the rarity of true school mergers and the additional complexity introduced by conducting such a merger during the COVID-19 pandemic. The problem statement identified the lack of empirical guidance for school leaders navigating mergers, while the study's

significance emphasized its potential contributions to the educational leadership and organizational change literature.

The chapter also outlined my positionality, acknowledging the dual role of practitioner and researcher in the merger process. The purpose of the study was clearly defined as an examination of how a school merger impacts teacher perceptions of trust, teacher influence, and collaborative practices, as well as the leadership actions that facilitated the transition. Research questions and hypotheses were presented to guide the investigation, followed by a rationale for the use of a qualitative case study design. Additionally, the conceptual framework was introduced, highlighting the interconnected roles of leadership, teacher capacity, trust, collaboration, and collective teacher efficacy. Key terms were defined to ensure clarity and consistency throughout the study.

The remainder of this dissertation is organized as follows. Chapter 2 presents a comprehensive review of the literature related to school mergers, leadership practices, teacher capacity, collective efficacy, trust, and collaboration. This chapter synthesizes existing research to establish a theoretical and empirical foundation for the study and to identify gaps in the literature that the present study seeks to address. Chapter 3 outlines the research methodology and design, including the study setting, participants, data sources, and procedures for data collection and analysis. Chapter 4 presents the study's findings, including both quantitative and qualitative results, organized by key themes aligned with the research questions. Finally, Chapter 5 discusses the findings in relation to the existing literature, outlines implications for practice and policy, and offers recommendations for future research.

CHAPTER II

LITERATURE REVIEW

School mergers represent a complex and relatively underexplored form of organizational change within educational systems. While a substantial body of research has examined school leadership, teacher collaboration, communication systems, and instructional improvement, limited scholarship has investigated how these elements interact during the merger of two schools into a unified organization. This gap is particularly significant given the increasing prevalence of school consolidation efforts driven by demographic shifts, enrollment fluctuations, and resource allocation pressures.

Organizational change in educational settings involves not only structural adjustments but also shifts in professional relationships, instructional practices, and collective identity (Fullan, 2016; Hargreaves & O'Connor, 2018). During a school merger, educators must navigate uncertainty, redefine roles, and establish new systems for collaboration and communication. These processes have important implications for both teacher well-being and student learning outcomes.

This chapter synthesizes literature across five interrelated domains: (a) organizational change and school mergers, (b) communication systems in schools, (c) professional learning communities and teacher collaboration, (d) teacher capacity and instructional improvement, and (e) leadership, autonomy, and collective efficacy. Together, these strands provide a conceptual foundation for examining how systems and leadership practices influence teacher experiences during a school merger.

Organizational Change and School Mergers

School mergers are often initiated in response to external pressures such as declining enrollment, financial constraints, or district restructuring (Dee & Rappaport, 2018). Although such initiatives may improve operational efficiency, they frequently introduce challenges related to organizational culture, professional identity, and staff cohesion (Howley et al., 2018).

While school mergers involve the integration of two organizations into a newly unified entity, a related but distinct form of consolidation involves the closure of one school and the absorption of its students and staff into an existing institution. Recent research highlights important differences in how these models shape organizational dynamics and stakeholder experiences. For example, analyses of the Chicago Public Schools closures found that students displaced by school closures were reassigned to designated receiving schools, with outcomes largely dependent on the quality and stability of those receiving environments (Dee & Rappaport, 2018). Similarly, studies of rural school consolidation demonstrate that closures followed by absorption into larger schools often result in the loss of community identity and disruption of established professional relationships, even when operational efficiencies are achieved (Howley et al., 2018). In urban contexts, research on school closures in Philadelphia indicates that reassignment to existing schools can introduce challenges related to school climate, integration, and continuity of support for both students and staff (Steinberg & MacDonald, 2019). Taken together, these findings suggest that closure-and-absorption models may intensify issues of disruption and identity loss, as they require individuals to enter pre-existing organizational cultures rather than co-constructing a new one. This distinction is critical for the present study, which examines a merger model in which two schools combined to form a unified

organization, thereby necessitating the development of new systems, relationships, and shared norms.

Organizational change theory suggests that change processes in education are inherently complex, nonlinear, and deeply human (Fullan, 2016). Educators experiencing change often encounter uncertainty, role ambiguity, and evolving professional expectations (Day et al., 2020). These challenges are intensified in merger contexts, where staff from previously distinct organizations must integrate into a unified system with shared norms and practices. Successful organizational change requires coherence, a shared vision, and sustained leadership support (Fullan, 2016). Hargreaves and Shirley (2020) further emphasize the importance of building professional capital and fostering collaborative cultures during periods of transition. Without intentional structures to support staff, organizational change can negatively impact morale, trust, and instructional effectiveness.

Despite the broader literature on school improvement, research specifically focused on elementary school mergers remains limited. Existing studies suggest that leadership practices, communication systems, and collaborative structures are critical to successful integration; however, the dynamic interaction among these elements during mergers remains insufficiently examined.

Communication Systems in Schools

Communication systems serve as the primary mechanism through which school leaders convey expectations, coordinate efforts, and build trust among staff. Effective communication is consistently associated with improved school climate and positive teacher perceptions of leadership (Bryk & Schneider, 2002; Tschannen-Moran, 2014). More recent research reinforces the finding that principals who engage in clear, consistent, and relational communication

practices contribute significantly to teacher satisfaction, organizational coherence, and student outcomes (Grissom et al., 2021; Leithwood et al., 2020). In this sense, communication functions not only as a managerial tool but as a central component of instructional leadership and school improvement.

During periods of organizational change, communication becomes especially critical. Teachers require clarity, consistency, and opportunities for feedback to navigate uncertainty and adapt to new expectations (Fullan, 2016). Research suggests that the frequency and predictability of communication play an important role in reducing ambiguity during change processes, with regular and structured communication routines supporting coherence and shared understanding (Leithwood et al., 2020). Similarly, teachers report more positive perceptions of their working conditions in schools where leaders communicate consistently and proactively rather than reactively (Kraft et al., 2016).

The tone of communication is also central to its effectiveness. Communication that is transparent, respectful, and supportive fosters relational trust and strengthens staff engagement (Kutsyuruba et al., 2019; Tschannen-Moran, 2014). Leaders who clearly articulate the rationale behind decisions, acknowledge challenges, and demonstrate empathy are more likely to build trust, particularly during periods of uncertainty (Harris & Jones, 2020). This finding aligns with research on psychological safety, which suggests that individuals are more willing to engage, collaborate, and share feedback when they feel safe and supported within their organization (Edmondson, 2018).

Bidirectional communication, where leaders actively solicit and respond to staff input, has been shown to strengthen trust and engagement (Kutsyuruba et al., 2017). Contemporary leadership research emphasizes that communication is most effective when it is dialogic rather

than unidirectional, involving reciprocal exchanges between leaders and staff (Spillane et al., 2019). Feedback structures such as surveys, listening sessions, and collaborative meetings provide opportunities for teacher voice and contribute to stronger organizational commitment when leaders visibly respond to and act upon that input.

Additionally, communication in schools extends beyond formal structures. Daly et al. (2020) highlight the role of social networks in shaping information flow and organizational functioning, demonstrating that both formal and informal communication systems influence how information is interpreted and enacted within schools. Informal interactions, including peer collaboration and day-to-day relational exchanges, often shape how messages are understood and implemented, underscoring the importance of attending to both formal communication systems and the broader relational context of the school.

The modality of communication further influences its effectiveness. Leaders who utilize multiple communication channels, including written communication (e.g., newsletters, emails), face-to-face interactions (e.g., meetings, walkthroughs), and digital platforms, are better positioned to ensure clarity, reinforce key messages, and maintain relational connections with staff (Harris & Jones, 2020; Kraft et al., 2016). Multi-modal communication allows leaders to balance efficiency with relational depth, increasing the likelihood that messages are both received and understood.

Clear and focused communication systems can positively influence both teacher well-being and student outcomes by reducing ambiguity and fostering psychological safety (Edmondson, 2018). When teachers feel informed, supported, and heard, they are more likely to demonstrate higher levels of trust, collaboration, and professional engagement (Grissom et al., 2021). However, communication alone is insufficient to drive improvement. It must be

embedded within broader systems that support collaboration and instructional growth. As Spillane et al. (2019) suggests, communication practices are most effective when integrated into a larger leadership infrastructure that supports collective work and shared responsibility for improvement.

Professional Learning Communities and Teacher Collaboration

Professional learning communities (PLCs) provide a structured approach to collaboration focused on improving teaching and learning. PLCs are defined as teams of educators who engage in ongoing, data-informed inquiry to enhance student outcomes (DuFour, 2008; Sather & Barton, 2006). Research indicates that PLCs contribute to improved instructional alignment, increased teacher collaboration, and higher student achievement (Lomos et al., 2016; Vangrieken et al., 2017). Through shared inquiry and collective problem-solving, teachers develop a deeper understanding of student needs and instructional strategies.

A central component of PLCs is the use of data to inform instruction. Datnow and Park (2018) argue that collaborative data use enables educators to identify learning gaps and adjust practices accordingly, shifting responsibility from individual teachers to collective ownership of student outcomes. PLCs are particularly valuable during organizational change. They provide a mechanism for integrating staff, aligning instructional practices, and building professional relationships. Hargreaves and O'Connor (2018) conceptualize this process as collaborative professionalism, where shared responsibility and collective expertise drive improvement.

Teacher Capacity and Instructional Improvement

Teacher capacity refers to educators' ability to effectively meet student needs through instructional practice, collaboration, and ongoing professional learning. Building teacher capacity is a central component of school improvement and is strongly influenced by leadership

practices and organizational structures. Leadership plays a critical role in developing teacher capacity, particularly in supporting foundational instructional practices (Fuller & Templeton, 2019). Instructional coaching is one of the most effective mechanisms for enhancing teacher capacity. Research demonstrates that coaching, particularly when combined with modeling and feedback, improves instructional quality and teacher efficacy (Kraft et al., 2018). Further, coaching that focuses on data use enables teachers to make informed instructional decisions. For example, coaching practices that emphasize interpreting and applying student data have been shown to strengthen teachers' ability to adjust instruction and improve outcomes.

Teacher-driven professional development also contributes to capacity building (Vangrieken et al., 2017). Adult learning theory (Knowles et al., 2015) suggests that autonomy, relevance, and active engagement are essential for meaningful professional learning. When teachers have input into professional development, they are more likely to engage deeply and apply new learning to their practice (Datnow & Park, 2018).

Teacher Autonomy, Trust, and Well-Being

Teacher autonomy is a critical factor influencing both teacher well-being and instructional effectiveness. Autonomy allows educators to exercise professional judgment, adapt instruction to student needs, and engage in innovative practices. Research suggests that higher levels of autonomy are associated with increased job satisfaction and a more positive school climate (Al-Bataineh et al., 2021). However, autonomy must be balanced with coherence and shared expectations. Although excessive control can limit teacher effectiveness and reduce morale (Ingersoll, 2006), insufficient structure can lead to fragmentation and inconsistency (Fullan, 2016).

Trust is closely connected to autonomy. Bryk and Schneider (2002) identify relational trust as a foundational element of school improvement. Trust among educators, and between teachers and leadership, supports collaboration, risk-taking, and shared responsibility (Vangrieken et al., 2017). In contexts of organizational change, trust becomes even more critical as educators navigate uncertainty and adapt to new systems.

Leadership, Teacher Leadership, and Collective Efficacy

Leadership is a central factor in shaping school culture, teacher capacity, and student outcomes. A variety of leadership approaches are discussed in the literature. Transformational leadership, characterized by vision, motivation, and support, has been associated with improved school climate and organizational functioning (Allen et al., 2015). Servant leadership further emphasizes the role of leaders in supporting the growth and development of others. Taken together, these leadership practices prioritize teacher support, professional learning, and shared decision-making contribute to stronger instructional systems and improved outcomes (Fuller & Templeton, 2019).

Teacher leadership is also essential to school improvement. When teachers are empowered to take on leadership roles, they contribute to professional learning, instructional improvement, and organizational coherence (Balyer et al., 2017). This distributed approach to leadership enhances sustainability and fosters a culture of shared responsibility. Collective teacher efficacy represents one of the most powerful predictors of student achievement (Hattie, 2008). It reflects a shared belief among educators that they can positively impact student learning. Collective efficacy develops through collaboration, trust, and shared success (Bandura, 1997), and is strongly influenced by leadership and organizational structures.

Conceptual Framework

The conceptual framework guiding this study is grounded in interconnected theories of leadership, teacher capacity, and collective efficacy, which together provide a lens for understanding how school mergers influence organizational culture and teacher perceptions. As Maxwell (2004) explains, a conceptual framework represents a system of interrelated concepts and assumptions that informs how a researcher understands and investigates a phenomenon. In this study, the phenomenon of interest is the process of merging two elementary schools into a single unified organization and the resulting impact on teachers.

At the center of this framework is the concept of collective teacher efficacy, defined as the shared belief among educators that they can positively influence student outcomes despite external challenges (Hattie, 2008). Collective efficacy has been identified as one of the most influential factors affecting student achievement and is closely tied to levels of trust, collaboration, and shared responsibility among staff. In the context of a school merger, collective efficacy is particularly relevant, as educators must transition from functioning within separate organizational cultures to developing a unified sense of purpose and capability.

Closely related to collective efficacy is teacher capacity, which refers to educators' knowledge, skills, and ability to effectively support student learning. Building teacher capacity involves providing opportunities for professional learning, collaboration, and shared leadership. Research suggests that when teachers are supported in developing their instructional practices and given opportunities to lead, both teacher well-being and student outcomes improve (Kraft et al., 2018; Vangrieken et al., 2017). In a merger context, capacity-building becomes especially important, as teachers must adapt to new systems, colleagues, and expectations while maintaining instructional effectiveness.

The framework also draws upon principles of distributed and transformational leadership. Distributed leadership emphasizes the sharing of leadership responsibilities across members of the organization rather than concentrating authority solely in formal administrative roles. This approach aligns with the idea that successful organizational change, such as a school merger, requires the active involvement and leadership of teachers (Balyer et al., 2017). Transformational leadership focuses on leaders' ability to inspire, motivate, and support staff through periods of change, which has been linked to improved school climate and organizational functioning (Allen et al., 2015).

Trust serves as a critical linking construct within this framework. Trust between teachers, as well as between teachers and administrators, underpins effective collaboration and the development of collective efficacy. In environments where trust is low, collaboration is often limited and resistance to change may increase. Conversely, when trust is intentionally cultivated, educators are more likely to engage in shared decision-making, take instructional risks, and contribute to a positive school culture (Bryk & Schneider, 2002; Tschannen-Moran, 2014).

Leadership practices influence the development of communication systems, including the clarity, consistency, and responsiveness of information shared with staff. Effective communication reduces uncertainty and fosters relational trust, particularly during periods of organizational transition (Fullan, 2016; Kutsyuruba et al., 2017). Communication systems are closely connected to collaborative structures, particularly professional learning communities (PLCs). When communication is clear and bidirectional, it supports the development of collaborative practices by establishing shared expectations and facilitating collective problem-solving (Datnow & Park, 2018; DuFour, 2008). PLCs serve as the primary mechanism through which teachers engage in shared inquiry, data use, and instructional alignment.

Through these collaborative structures, teacher capacity is further strengthened. Leadership-supported collaboration and coaching practices contribute to increased teacher efficacy and instructional improvement (Kraft et al., 2018). At the same time, teacher autonomy within these structures plays an important role in sustaining engagement and professional growth.

These interconnected systems, leadership, communication, collaboration, and teacher capacity, collectively influence teacher experiences during a school merger, including perceptions of trust, professional well-being, teacher influence, and collective efficacy. These factors are particularly salient in merger contexts, where educators must navigate changes in organizational identity, relationships, and expectations.

The framework also acknowledges organizational change as the contextual condition within which these relationships occur. School mergers introduce complexity, uncertainty, and the need for system integration. As such, the effectiveness of leadership practices and organizational systems becomes especially critical in shaping outcomes during periods of significant transition (Fullan, 2016; Hargreaves & O'Connor, 2018).

Together, these constructs form an integrated conceptual framework in which leadership actions influence communication systems and collaborative practices, which in turn shape teacher capacity, trust, and collective efficacy. This framework guides the study's research questions, data collection, and analysis by providing a lens through which to examine how leadership decisions and organizational systems influence teachers during and after a school merger.

CHAPTER III

METHODS

Research Design

This study employs a qualitative case study design to examine the merger of two elementary schools within a single district. Case study methodology is appropriate for investigating a bounded system in depth and within its real-world context. The study is further informed by principles of participatory action research (PAR), as the researcher was directly involved in the phenomenon under investigation. Participatory action research emphasizes reflection, inquiry, and action and is particularly appropriate when practitioners seek to better understand and improve their own practice (Stringer, 2014). Further, to deepen the analysis of leadership practices, this study incorporates critical discourse analysis (CDA). CDA is used to examine how language reflects and shapes organizational processes, particularly in relation to leadership communication.

Setting

This study was conducted in a suburban public school district in the Midwestern United States. The district employed approximately 400 full-time staff members, of whom approximately 180 worked in the newly merged elementary school. The study focuses on the merger of two elementary schools serving students in grades one through three. The merger occurred over a two-year period, spanning the 2020–2021 and 2021–2022 school years. Student demographics reflect a diverse population, with 36% identified as low-income and approximately 29.4% as English learners. The merger took place during the COVID-19 pandemic, a period marked by remote instruction and significant disruption to traditional schooling.

Participants

Participants in this study included certified staff members from both elementary schools involved in the merger. Staff participation occurred through anonymous survey responses, and indirect contributions through organizational artifacts. Survey participation ranged from 32 to 103 staff members across multiple data collection points. All data were anonymized to encourage honest feedback and reduce potential power dynamics associated with the researcher's leadership role. Because surveys were anonymous and participation tracking was not systematically recorded, the exact number of unique participants for each survey could not be determined. Response counts are therefore used as an approximate indicator of participation. Across all surveys conducted for this study, 180 participants were given the opportunity to respond.

Rationale for Methodology

I selected a qualitative approach as the most appropriate methodology to address the research problem and associated research questions because of my desire to bring teachers' voices to the fore. The purpose of this study is to examine how merging two elementary schools affects teachers' perceptions of trust, teacher influence, and collaborative practices, and to identify the leadership actions that facilitated the transition. Given this focus, the use of qualitative methodology is warranted.

This study employs a case study design, focusing on a single, bounded system: the merger of two suburban elementary schools into a unified institution. Case study methodology is particularly appropriate for examining complex, real-world phenomena within their specific context. The uniqueness of this merger, characterized as a true merger of two equal schools rather than the absorption of one into another, further supports a case study approach, as it allows for an in-depth exploration of a relatively understudied phenomenon.

Qualitative data sources include open-ended survey responses and leadership communications, which provide insight into the experiences of staff and the actions taken by school leaders during the merger process. The integration of these data sources enables triangulation, strengthening the validity of the findings.

The study sample consists of certified and non-certified staff members from both schools involved in the merger. A population sampling approach was used, with all eligible staff members invited to participate in surveys and other data collection methods. This approach ensures that a wide range of perspectives is represented and allows for a more comprehensive understanding of staff experiences during the merger.

Sources of Data

Several sources of data were collected during the two-year merger. These include two different types of surveys administered by school leadership as well as artifacts from the merger (weekly newsletters from the leadership team and results of the statewide Illinois 5essentials survey). Each of these data sources is described in greater detail below.

Staff Surveys

Data were collected on a regular basis throughout the merger process using two primary survey tools: Google Forms and *ThoughtExchange* surveys. The use of multiple survey methods allowed for the collection of both immediate, informal feedback and more structured, consensus-based input from staff, providing a more comprehensive understanding of staff experiences during the merger.

The *Google Forms* surveys were administered six times between September 2020 and February 2021. These surveys were distributed via email to all certified and non-certified staff and were typically embedded within weekly staff communications. Each survey consisted of a

small number of open-ended questions (generally 2–5 items) designed to elicit timely, reflective feedback. Examples of prompts include: “Where are you at today?”, “What is on your mind?”, and “What do you need?” These surveys were intentionally brief and took approximately 25 minutes to complete, allowing for frequent administration and encouraging consistent participation. Responses were anonymous unless participants chose to self-identify. Participation rates varied across administrations but generally included a broad cross-section of staff, as the surveys were positioned as informal check-ins rather than formal evaluations. The primary purpose of the Google Forms surveys was to capture real-time staff perceptions, emotional states, and immediate needs during the merger and pandemic-related instructional changes. These data provided ongoing insight into staff well-being, communication effectiveness, and emerging challenges.

More formal *ThoughtExchange* surveys were administered at key transition points during the merger process. Unlike the Google Forms surveys, which were brief and recurring, ThoughtExchange surveys were more structured and designed to facilitate collective input and prioritization of ideas. Two primary ThoughtExchange surveys were conducted. The first focused on identifying perceived strengths and positive aspects of the school environment, while the second asked staff to provide input on how to merge the two schools without losing the unique culture of each building. These surveys included a single broad prompt, and participants were asked to submit responses (“thoughts”) and then rate the responses of others using a star-based system. This platform allowed for both qualitative data collection and quantitative prioritization, as responses were ranked based on staff ratings. As a result, ThoughtExchange surveys not only captured individual perspectives but also highlighted areas of collective agreement and shared priorities among staff. Participation in ThoughtExchange surveys was

typically higher than in Google Forms surveys, perhaps due to the interactive nature of the platform and the emphasis on collective voice. Additionally, the ranking feature provided a mechanism for identifying the most salient themes across participants.

Although both survey tools utilized open-ended questions to capture staff perspectives, they differed in purpose, structure, and function. Google Forms surveys were brief, frequent, and designed to capture immediate, individual feedback in a flexible and low-stakes format. In contrast, ThoughtExchange surveys were administered less frequently and were designed to facilitate deeper reflection and collective prioritization of ideas through an interactive rating process. Both tools were similar in that they prioritized participant voice and allowed for unstructured responses; however, ThoughtExchange added a layer of consensus-building through its ranking feature, whereas Google Forms surveys emphasized immediacy and responsiveness. Together, these complementary methods allowed for both ongoing formative feedback and broader, summative insights into staff experiences during the merger.

Weekly Newsletters

I analyzed the weekly leadership newsletters that were a regular part of the communication process during the merger. These newsletters were written by me and distributed via email to staff only; they were not shared with families or the broader community. The newsletters served as a primary mechanism for communicating survey results, providing updates, and outlining next steps throughout the merger process. Each newsletter followed a consistent structure. The introductory section typically included a brief framing of current events or challenges, a summary of recent staff feedback, and an explanation of how that feedback was informing decisions and next steps. These introductory sections were designed to reinforce transparency, acknowledge staff perspectives, and communicate a clear path forward. Although

the newsletters were not treated as a formal data source for coding or analysis, they are included as artifacts to illustrate how I communicated with staff and responded to their input over time. The introductory sections provide insight into how leadership messaging was used to frame the merger process, emphasize priorities, and connect staff feedback to action.

Representative examples of these introductory sections are provided below to illustrate the tone, structure, and content of the newsletters (see Figure 2). These three excerpts were drawn from weekly staff newsletters written and distributed by the researcher during the merger process.

Figure 2. Sample Introductory Sections from Weekly Leadership Newsletters

Example 1: Clear and focused systems for communication positively impact student achievement and teachers' perception of well-being.

"Communication is critical, especially in a year filled with changes, updates, and upgrades. We find a communication method to relay these changes/updates that work for as many of you as possible. We need your input to know what that is. Below is a form in which we ask you for your opinion in deciding how we share out last-minute changes, upcoming events, and how you would like to get your questions answered from admin. I will post the results from these questions in next week's newsletter. The more people that respond to the survey, the better picture we will have about how we can help streamline communication. We would love to hear from you."

Example 2: Professional learning communities

"As we head into our institute day, I'd like to share the big picture of what October 8th is all about. We spoke at the beginning of the year about how our students would be coming in with differing needs. Our students would have gaps, and it would be all hands on deck to support

them the best way we can. We have opened up specialists' schedules and given teachers the autonomy to maneuver within units in the way that teachers feel is best for their students.

We have seen our students, built relationships, and assessed them. As anticipated, there are gaps. While pull-out (tier 2) support is wonderful, there are too many needs to support every student with tier 2 support. The only way we can meet all these varied needs is at the tier 1 level. Differentiation within the classroom is how we can meet the needs of all students. Is it hard? Definitely. Is it doable? Certainly. Utilizing common assessments and balanced literacy and math frameworks are ways we can make that happen.

Many of you have heard me say this already, so feel free to roll your eyes. Tier 2 support is an essential line of defense to ensure students do not fall behind, but a strong tier 1 is the offense we need to allow us to thrive. So, let's start playing some offense!

Utilizing common assessments as part of a PLC model is a data-backed way of succeeding school-wide. If we take the time to have common assessments and discuss with our grade-level teams, ensuring we are all on the same page with the assessment is crucial. What also comes from taking and discussing assessments is learning from one another and improving our profession. Some of the best conversations I've had with my fellow educators have come from discussing nuances within common assessments.

Using all of the data we have available is another way of meeting students' varied needs. We all felt lost without academic indicators for our students last year. We now have multiple data points; let's leverage that data in all aspects of instruction, especially in the classroom, where our students spend the vast majority of their time. We will be spending time on institute day looking at our students' various assessments, what these assessments can tell us, and how to use all available data points to differentiate within the classroom.

Have you been through this process before? Great! It will be a solid refresher and an opportunity to reflect on how you've grown as an educator since the last time. Then, you can share your experiences with the rest of us. Are you new to tier 1 differentiated instruction and/or common assessments? There is no time like the present!

I look forward to spending this day working on our offense with all of you."

Example 3: Survey feedback communication

"Let's kick this off by stating how I appreciated your responses in the Thoughtexchange and IRL to the many changes surrounding Forest_ Elementary 2.0. Did I expect to be pelted with rotten fruit? Maybe. But your comments have been actionable and forward-thinking. You have given great suggestions and shared valid concerns over logistics. If you check out the top thoughts, most are regarding packing logistics. It makes perfect sense and only made more sense when Evelyn went all Maslow on me and explained how the packing concerns are part of the base of the hierarchy of needs.

I responded to those Thoughtexchange comments for which I knew the answer. More good questions are unanswered, but we have set meetings to get those answers for you.

I also saw a couple of comments in both the Thoughtexchange and the unity 4-square organizers mentioning being "toxic" or "toxic positivity." Although I had a passing familiarity with the term, I didn't know much other than that toxic positivity has a "grin and bear it" mentality. So, I needed to do some reading and find out more. I found that toxic positivity causes others to feel shame for not being positive. As a Brene Brown fan, I definitely need to make sure I am not the cause of someone else's feelings of shame. After reading about its definition, I looked at the hope/validation and toxic positivity comparison. I will include a couple of the charts in this newsletter. I hope my optimism about the unity plan did not cause me to invalidate others'

feelings about the process. I was brought in with this purpose in mind, so I haven't needed a mindset shift.

Surveys

To examine teacher perceptions of communication, leadership, and support during organizational change, a series of open-ended prompts were administered to staff. These prompts were designed to elicit reflective responses related to participants' current experiences, perceived needs, and interactions with leadership. Consistent with qualitative approaches that emphasize participant voice and meaning-making (Maxwell, 2004), I intentionally structured the questions to be broad and non-directive.

Prompts began with a focus on participants' immediate experiences and well-being, including questions such as "Where are you at today?", "What is on your mind?", and "What do you need?" These questions were intended to surface teachers' emotional and professional states in real time, providing insight into how staff were experiencing ongoing changes within the school context.

Questions related to instructional practices and professional learning needs were also included. Participants were asked to reflect on their experiences with lesson planning and instructional delivery (e.g., "Based on your experiences so far, what are some tips for lesson planning?") as well as their interest in professional development topics (e.g., "Which topics would you be interested in learning about?"). These items were designed to capture how communication and leadership structures influenced instructional coherence and professional growth.

In addition, questions examined communication effectiveness and leadership support. Staff were asked to consider how leadership could better support them (e.g., "In what ways can

your administrative team better support you?") and how communication systems could be improved. I also included questions addressing student engagement challenges, such as "How can we reach students who are missing lessons?", allowing participants to connect leadership practices with instructional and student-centered outcomes.

Finally, items related to collaboration and community were included to assess relational aspects of the organization. Participants were asked about their interest in collaborative opportunities and peer support structures (e.g., "Are you interested in being part of a small support team to connect and support one another?"). Additional prompts invited participation in school-wide initiatives, such as co-hosting announcements, which provided insight into staff willingness to engage in shared leadership practices. Collectively, these prompts functioned as a flexible communication and feedback system, allowing ongoing input from staff while also modeling bidirectional communication practices. The design of these questions aligns with research emphasizing the importance of frequent, responsive, and dialogic communication systems in fostering trust, collaboration, and organizational coherence during periods of change (Daly et al., 2020; Kutsyuruba et al., 2017; Spillane et al., 2019).

Open-ended questions

1. Where are you at today?
2. What is on your mind?
3. What do you need at this time?
4. Based on your experiences so far, what are some tips or strategies for lesson planning?
5. Which professional learning topics would you be interested in exploring further? (Participants were invited to select all that applied.)

6. Would you be interested in co-hosting the morning announcements? If so, please indicate your interest. *(Optional; responses were otherwise anonymous.)*
7. How can we better reach students who are missing lessons or are not fully engaged?
8. In what ways can the administrative team better support you?
9. Are you interested in being part of a small support team to connect and support one another on a personal and professional level?

Illinois 5essentials Survey Data

The state of Illinois administers the *Illinois 5essentials*, an annual statewide survey, to teachers and students. It measures five key indicators of effective schools: effective leaders, collaborative teachers, involved families, supportive environment, and ambitious instruction with 100-110 questions in total. Each year, the questions are the same. Of the 180 teachers eligible to take the survey, 120 (66.7%) completed it. In this study, this survey was used to measure changes in teacher perceptions before and after the school merger.

Data Collection Procedures

All data used in this study were collected as part of the natural process of leading the school merger, rather than for the explicit purpose of research. However, the district later granted permission to use these data for research. Data collection occurred over the 2020–2022 school years. Survey data were collected using district-approved platforms and required staff login credentials, ensuring responses were limited to relevant participants. All responses were anonymized prior to analysis.

Because data were collected prior to the development of formal research questions, this study is retrospective in nature. This approach aligns with participatory action research, in which practitioners reflect on their own practice to generate insights.

Data Analysis Procedures

Initial coding was conducted using *in-vivo* coding methods to preserve participants' original language and remain closely grounded in the data (Stringer, 2014). During this phase, I reviewed participants' written responses line by line and identified key words and phrases that captured the essence of their statements. Rather than assigning pre-established categories, I generated codes directly from participants' language, using their exact words whenever possible.

For example, when participants referenced a need for "clear communication" or requested "reminders of the why," these phrases were used as initial codes. This approach allowed me to prioritize participants' perspectives and reduce the influence of researcher-imposed interpretations during early analysis.

I documented these *in vivo* codes in a coding table and applied them across the dataset, grouping similar phrases and repeated language patterns. As coding progressed, I examined the frequency and consistency of these codes to identify emerging patterns related to communication, leadership support, and teacher needs. These initial *in-vivo* codes were then used to inform the development of broader categories and themes in subsequent rounds of analysis.

Thematic Analysis

Following initial coding, thematic analysis was used to identify patterns and develop broader categories across the dataset. Using the *in vivo* codes generated during first-cycle coding, I examined similarities, differences, and recurring ideas across participant responses. Codes that reflected related concepts were grouped together to form preliminary categories.

During this process, I used a constant comparative approach, reviewing data iteratively to refine categories and ensure that they accurately represented participants' perspectives. I compared codes across responses, survey types, and time points to identify patterns that were

consistent as well as those that reflected variation in staff experiences. This iterative process allowed for refinement, consolidation, and, when necessary, reorganization of categories.

As categories became more clearly defined, I developed broader themes that captured the underlying meaning across groups of related codes. These themes represented higher-level patterns in the data and were aligned with the focus of the study, including communication practices, leadership support, teacher needs, and organizational change processes. Throughout this phase, I returned to the original data to ensure that themes remained grounded in participants' language and experiences.

To enhance the credibility of the analysis, I maintained a coding framework that documented the progression from initial *in vivo* codes to categories and final themes. I also reviewed themes in relation to the full dataset to ensure that they were internally consistent and distinct from one another. This process resulted in a set of themes that reflects both the frequency and significance of patterns across participant responses.

Critical Discourse Analysis

In addition to survey data, I used weekly leadership newsletters as part of the communication process during the merger. I wrote these newsletters as the primary mechanism for sharing survey results with staff and communicating the next steps based on that feedback. For this study, I did not treat the newsletters as an independent source of data for formal analysis. Rather, they functioned as part of an iterative feedback loop in which staff input informed my communication, and that communication, in turn, contributed to shaping ongoing organizational understanding. Through these newsletters, I summarized survey findings, highlighted key themes, and communicated action steps in response to staff feedback.

This process allowed me to remain responsive to staff input while supporting transparency throughout the merger. Although the content of the newsletters was informed by my analysis of survey, I did not code or analyze the newsletters using *in-vivo* or thematic methods. Instead, I include them as artifacts that illustrate how I interpreted and responded to staff input over time.

Researcher Positionality

In keeping with expectations for high-quality qualitative research, it is important to discuss research positionality. Indeed, my background and relationship to the schools in question are central to understanding the context and interpretation of this study. At the time of the merger, I was serving as an Associate Principal at the merged school and in this role, I was directly responsible for facilitating the integration of the two schools. Serving in this role provided a unique vantage point from which to observe, influence, and reflect upon the merger process.

My interest in this topic is deeply rooted in professional experience. My decision to accept the administrative role was driven, in part, by the opportunity to engage in and learn from a real-time school merger. The experience of leading a school through significant organizational change, particularly under the unprecedented conditions of a global pandemic, prompted critical reflection on the role of leadership in shaping school culture, supporting staff, and navigating uncertainty. The merger presented a unique professional challenge: to unify two established school communities into a single cohesive entity without a predefined model to follow. This absence of a clear framework to guide this work heightened my awareness of the need for systematic study and documentation of the process. The experience also underscored the

importance of teacher voice, leadership distribution, and intentional communication in managing change.

I served as both a participant and investigator, having led the merger process. This dual role provides deep contextual insight but introduces potential bias. I acknowledge the possibility that I might interpret events in ways that align with my personal perspectives rather than accurately capturing the thoughts and feelings of staff during the merger, and I took steps to actively seek disconfirming evidence. At the same time, I acknowledge the potential for bias due to direct involvement in the phenomenon under study. As both a participant and investigator, it is essential that I critically examined personal assumptions and remained attentive to perspectives that might have challenged initial interpretations. This reflexivity is particularly important given the dual role of leading the merger and analyzing its outcomes.

To ensure methodological rigor and increase the trustworthiness of my findings, I employed a variety of strategies**.** I triangulated across multiple data sources. In addition to staff surveys and input, I analyzed research-based strategies regarding teacher empowerment, capacity building, communication, and adult learning. I engaged in regular reflection regarding the potential for researcher bias. I focused on being transparent in the procedures I used and have preserved all data sources for auditability, but to protect participants' confidentiality, I de-identified all data.

CHAPTER IV

RESULTS

This chapter presents the findings of the study examining the impact of a school merger on communication systems, teacher capacity, teacher collaboration, teacher influence, and teacher trust at Forest Elementary. The results are organized to align with both the study's research questions and broader organizational conditions before and after the merger, with particular attention to trends in Illinois 5Essentials data, staff feedback, and administrative actions.

School Baseline Data: School Rating Prior to the Merger

In Illinois, school ratings within the 5Essentials framework are derived from survey data collected from teachers and students. These surveys measure perceptions across the five essential domains, each of which has been empirically linked to student achievement and school improvement outcomes. Schools that demonstrate strength in three or more essentials are significantly more likely to improve student learning outcomes over time, whereas schools weak in multiple domains are less likely to show sustained improvement.

Prior to the merger, Forest Elementary was classified as "partially organized for improvement," indicating moderate levels of effectiveness across the five essential supports for school success: effective leaders, collaborative teachers, involved families, supportive environment, and ambitious instruction. This classification reflects a school that demonstrates some functional organizational structures but lacks consistency across key domains necessary for sustained improvement.

Illinois Accountability System and Summative Designations (2019–2023)

To contextualize changes in Forest Elementary's school rating over time, it is necessary to understand shifts in the Illinois accountability system during the study period. Between 2019 and 2023, the state's summative designation system underwent several significant changes due to both policy revisions and the impact of the COVID-19 pandemic. In 2019, schools were classified using four categories: *Exemplary*, *Commendable*, *Underperforming*, and *Lowest-Performing*. However, annual designations were paused in both 2020 and 2021 following federal accountability waivers, with 2019 ratings effectively carried forward during this period.

In 2022, accountability determinations resumed with modified methodologies designed to account for pandemic-related disruptions. These included temporary adjustments to indicators such as science performance and chronic absenteeism, as well as revised rules for identifying schools requiring support. By 2023, the system was further refined to include an additional "*Intensive*" designation and more clearly defined escalation pathways for schools not demonstrating improvement over time. Although the weighting of core indicators such as academic growth, proficiency, and attendance remained relatively stable, the calculation methods and accountability expectations shifted across years. As a result, changes in school designation during this period must be interpreted within the broader context of evolving state policy rather than direct year-to-year comparisons.

Student academic performance is a central component of Illinois' summative designation system and plays a significant role in determining a school's overall rating. Specifically, measures of academic proficiency (student performance on state assessments such as the *Illinois Assessment of Readiness*) and academic growth (year-to-year progress relative to peers) are weighted heavily within the accountability framework. At the elementary level, growth often

carries greater emphasis than proficiency, reflecting the state's focus on student improvement over time rather than static achievement levels. In addition to these core academic indicators, schools are also evaluated on factors such as chronic absenteeism and English learner progress, which are intended to provide a more comprehensive view of student outcomes. During the study period, while the relative importance of academic performance remained consistent, disruptions caused by the COVID-19 pandemic affected both the availability and interpretation of assessment data. As a result, fluctuations in Forest Elementary's summative designation must be understood not only in relation to changes in teacher capacity and organizational conditions, but also in light of shifts in how student academic performance was measured, weighted, and reported across years.

COVID-19 and Baseline Shifts in Illinois 5Essentials Data

To accurately interpret changes in teacher perception data, it is necessary to consider broader statewide trends in Illinois 5Essentials survey results during the COVID-19 period. Analysis of Illinois Report Card data from 2018 to 2023 indicates a measurable baseline decline in 5Essentials scores across schools statewide, particularly in the years following the return to in-person instruction. Specifically, composite 5Essentials scores remained relatively stable between 2019 and 2021 but declined significantly in 2022 and 2023, with an average decrease of approximately three points across domains. The largest declines were observed in *Collaborative Teachers* and *Ambitious Instruction*, both of which are directly related to the organizational conditions examined in this study. Importantly, these declines were not uniform across all domains or time points. Some domains, such as *Supportive Environment*, showed temporary increases in 2021 before declining in subsequent years. This variation suggests that the impact of

COVID-19 on school organizational conditions was complex and evolved over time rather than occurring as a single, immediate disruption.

These statewide trends provide important context for interpreting Forest Elementary's 5Essentials data. While declines in teacher perception at the school were significant, they occurred within a broader pattern of post-pandemic shifts in school climate across Illinois. As such, changes observed in this study should be viewed with an understanding of both local organizational factors, including the merger, and broader systemic influences related to the COVID-19 pandemic.

Organization of Chapter 4

The remainder of this chapter is organized into four major sections aligned with the study's research questions: (a) teacher collaboration (RQ1), (b) building teacher capacity (RQ2), (c) teacher influence (RQ3), and (d) teacher trust (RQ4). Each section includes baseline data prior to the merger, a description of merger-related actions, analysis of staff feedback, administrator responses, and post-merger outcomes as measured by 5Essentials data.

Teacher Collaboration (RQ1)

Prior to the merger, teacher collaboration at Forest Elementary was consistently rated as *weak*. Between 2019 and 2021, the *Collaborative Teachers* 5essentials data remained stable at approximately 34 out of a possible score of 100, indicating limited professional collaboration and shared responsibility among staff. Sub-measures revealed variability within this domain, including *moderate* levels of teacher-to-teacher trust but significantly lower levels of collaborative practices. In contrast, teachers rated their collaboration much lower in both 2022 and 2023 (see Table 1).

Table 1

Collaborative Teachers Trend (2019–2023)

Year	Score	Rating
2019	34	Weak
2020	34	Weak
2021	34	Weak
2022	25	Weak
2023	12	Very Weak

During the merger process, several structural changes were implemented in an attempt to unify staff from two separate buildings. These included the establishment of shared grade-level teams, the alignment of instructional practices, and the implementation of common planning structures. The transition required teachers to collaborate with new colleagues, adapt to shared expectations, and participate in newly formed professional learning communities (PLCs).

Staff feedback during the merger indicated both optimism and concern regarding collaboration. Teachers expressed interest in increased collaboration opportunities but also noted uncertainty about expectations and structures. One noted, “The most difficult part will be combining the varied programs and routines…” (Top Thoughts). Another shared, “I hope it doesn't become a battle of opinions… all staff should have their input heard” (Top Thoughts). Additional responses reinforced both the perceived benefits and challenges of collaboration. For example, one teacher described a positive experience, stating, “Collaboration! Sharing responsibilities! It’s been great having the whole team with a central plan”. However, others emphasized structural and relational barriers, noting, “Give us plan time so we can work together more to deliver quality instruction” and “We never meet as a whole team… I feel like we have

lost connections we used to have with people". These responses reflect a tension between the potential benefits of collaboration and the practical challenges of implementation, particularly related to time, structure, and maintaining professional relationships across merged staff.

In response to staff feedback, administrators implemented structured PLCs, assigned instructional coaches as facilitators, and established regular meeting times for collaborative planning. Leadership communication emphasized collaboration as a core organizational value, as can be seen in the newsletter commentary, "Utilizing common assessments as part of a PLC model is a data-backed way of succeeding school-wide…" (Associate Principal Staff Newsletter, 10/7/21). A few months later (or earlier, or the following week, or whatever timeframe is accurate), another newsletter assured staff, "We will be asking our team leaders to help us problem solve your anonymous responses…" (Associate Principal Staff Newsletter, 10/8/20). These actions reflect a strong emphasis on collaborative structures; however, they relied heavily on systems rather than relational development.

Post-merger data indicate a significant decline in teachers' ratings of their collaboration. By 2023, the *Collaborative Teachers* essential decreased to 12, categorized as *very weak*. Similarly, sub-measures such as *school commitment*, *collective responsibility*, and *collaborative practices* all demonstrated substantial decreases, suggesting that collaborative structures were not fully internalized by staff during the transition period.

Building Teacher Capacity (RQ2)

Teacher capacity, reflected through measures such as *Instructional Leadership* and *Quality Professional Development*, showed moderate strength prior to the merger. In 2021, instructional leadership was rated at 44 and professional development at 38 out of a possible score of 100, indicating partially developed systems for supporting teacher growth (see Table 2).

Table 2

Teacher Capacity Decline (2021–2023)

Measure	2019	2020	2021	2022	2023
Instructional Leadership	49	46	44	24	13
Program Coherence	29	35	44	33	17
Professional Development	38	27	38	35	16

The merger required the alignment of instructional practices and the development of consistent expectations for teaching and learning. This included integrating curriculum, standardizing assessment practices, and increasing access to professional learning opportunities. Staff feedback emphasized both opportunity and uncertainty related to teacher capacity. One teacher shared, “With grades together, services will be increased… collaboration… will help us all grow” (Top Thoughts), while another questioned, “What are the benefits to the students of making this change?” (Top Thoughts). Additional responses highlighted the strain placed on teachers’ capacity during this period. For example, one teacher stated, “I am working until 10 pm… it’s non-stop… parents are watching and criticizing”, while another emphasized workload concerns, noting, “I spend 5 hours each day prepping”. Others pointed to the need for structural supports, including time and training, with one teacher stating, “Give everyone time… we are overwhelmed.” These responses suggest that while teachers recognized potential benefits to increased capacity through collaboration and alignment, the demands of the merger and instructional shifts may have exceeded available supports, limiting the perceived effectiveness of capacity-building efforts.

In an attempt to support teacher capacity, administrators implemented PLCs focused on data analysis, differentiation, and instructional strategies. Leadership emphasized instructional alignment and capacity-building. In the Leadership Newsletter, I wrote, “Differentiation within the classroom is how we can meet the needs of all students” (Associate Principal Staff Newsletter, 10/7/21) and “You having the capacity… makes us better as a team” (Associate Principal Staff Newsletter, 8/27/21). These actions demonstrate a clear instructional vision; however, they introduced multiple simultaneous initiatives.

Post-merger data indicate substantial declines across all capacity-related measures. *Instructional leadership* decreased from 44 to 13; *program coherence* decreased from 44 to 17, and *professional development* declined from 38 to 16. These results suggest that while the administrators implemented capacity-building structures, they may not have been effectively internalized or perceived as supportive by staff.

Teacher Influence (RQ3)

Teacher influence was moderately low prior to the merger, with a score of 39 out of a possible 100 in 2021. This indicates limited teacher input in decision-making processes. The merger required increased teacher input to inform decisions related to curriculum alignment, scheduling, and instructional practices. Table 3 presents teacher’s self-reported rating of how much influence they felt they had on decisions at their school, a relatively stable number.

Table 3

Teacher Influence Trend (2021–2023)

Year	Score
2019	38

2020	36
2021	39
2022	36
2023	34

Staff feedback collected through surveys emphasized a strong desire for increased voice and transparency in decision-making processes. One teacher shared, “There should be… a staff survey to determine if staff are interested,” while another asked, “Can there be a reminder of the why behind this change?” Additional responses reinforced concerns about limited influence. For example, one teacher said that administrators should, “Ask us our advice before making changes”, while another emphasized the importance of shared decision-making, noting, “We’re the front line… before sharing a ‘must’ solution, ask the teachers.”

Other responses suggested a perceived shift away from collaborative decision-making structures, with one teacher reflecting, “I think we all felt more involved in the decision making when it was a shared process… now information is just sent out.” These responses indicate that while mechanisms for feedback were introduced, teachers did not consistently perceive their input as influencing decisions, contributing to the observed decline in teacher influence scores.

Partially in response to teachers’ expressed needs, administrators created feedback mechanisms, including surveys and collaborative meetings. Leadership emphasized teacher voice in the newsletter, telling teachers, “Getting your feedback… continues to be a priority” (Associate Principal Staff Newsletter, 10/8/20) and “It is your choice on how you teach… you can run with your vision” (Associate Principal Staff Newsletter, 11/12/21). Despite these efforts, teachers’ self-reported feeling that they had influence declined slightly from 39 to 34 during the

merger. While less dramatic than other domains, this decline suggests that efforts to increase teacher voice may not have translated into perceived influence.

Teacher Trust (RQ4)

Teacher trust showed moderate strength prior to the merger (see Table 4). In 2021, teacher–principal trust was rated at 51 out of a possible 100, indicating relatively high confidence in leadership. During the merger, school leadership made intentional efforts to build trust through communication, transparency, and consistent messaging. Staff feedback reflected

Table 4
Teacher Trust Indicators

Measure	2019	2020	2021	2022	2023
Teacher–Principal Trust	45	36	51	45	29
Teacher–Teacher Trust	47	41	43	35	26
Teacher–Parent Trust	41	39	52	36	24

both optimism and concern regarding trust during the merger process. One teacher shared, "Overall, I feel hopeful… there has been transparency," while another commented, "It will be good for students… they shouldn't feel like they are in different districts." However, additional responses revealed significant challenges related to trust and support. For example, one teacher stated, "Teachers are feeling very unappreciated by admin… it seems as if a walk in the hall is about as good as it gets." Another highlighted communication concerns, noting, "Communication from admin has not been the best… no one really knows what is going on." Others emphasized the need for relational trust and understanding, with one teacher stating,

“Trust us… we are doing the best we can”. These responses suggest that while leadership efforts emphasized transparency and support, inconsistencies in communication, workload pressures, and perceived lack of recognition may have undermined trust during the merger process.

Administrators prioritized communication through newsletters and meetings. Leadership emphasized transparency and support, even when doing so required vulnerability. In one newsletter, they shared, “Mistakes have been made… we will not shy away from admitting those mistakes” (Associate Principal Staff Newsletter, 10/22/20). Another time, leaders tried to reassure their staff, saying, “Nobody should cry alone. We are in this together” (Associate Principal Staff Newsletter, 5/14/21). Despite these efforts, however, post-merger data indicate a substantial decline in teacher trust. Teacher–principal trust decreased from 51 to 29, and teacher–teacher trust declined from 43 to 26. These findings suggest that trust was substantially negatively impacted during the merger process.

Table 5 displays an analysis of staff feedback responses across multiple data sources, including Top Thoughts, Staff Feedback Forms, and Teacher Voice surveys. In this table, the following codes were used to track the sources of data: TT = Top Thoughts dataset, SF = Staff Feedback Form, TV = Teacher Voice survey, P1 = Prompt 1 (primary open-ended question), R# = Response number (sequential within the dataset), CT = Classroom Teacher, SP = Specialist, and SS = Special Services.

Table 5

Staff Feedback Coding Across Data Sources

Code	Quote	Theme	Research Construct	Role
TT-P1-R4-CT	"I hope it doesn't become a battle of opinions… all staff should have their input heard"	Shared decision-making	Collaboration / Influence	Classroom Teacher
TT-P1-R5-CT	"There should be an East and West staff survey…"	Desire for voice	Influence	Classroom Teacher
TT-P1-R9-SP	"With grades together… collaboration… will help us all grow"	Professional growth	Capacity / Collaboration	Specialist
TT-P1-R12-SS	"The most difficult part will be combining the varied programs and routines…"	Implementation challenge	Collaboration	Special Services
SF-P1-R2-CT	"I am working until 10pm… it's non-stop… parents are watching and criticizing"	Workload stress	Trust / Capacity	Classroom Teacher
SF-P1-R3-CT	"Ask us our advice before making changes."	Lack of voice in decisions	Influence	Classroom Teacher
SF-P1-R7-CT	"Teachers are feeling very unappreciated by admin… it seems as if a walk in the hall is about as good as it gets"	Lack of administrative support	Trust	Classroom Teacher
SF-P1-R8-CT	"Communication from admin has not been the best… too much or not enough… no one really knows what is going on"	Inconsistent communication	Trust / Communication	Classroom Teacher
SF-P1-R10-CT	"Collaboration! Sharing responsibilities! It's been great having the whole team…"	Positive collaboration experience	Collaboration	Classroom Teacher
SF-P1-R12-CT	"Give everyone time… we are overwhelmed"	Time constraints	Capacity	Classroom Teacher
SF-P1-R15-CT	"Trust us – don't micromanage… we are doing the BEST we can"	Need for professional trust	Trust	Classroom Teacher
SF-P1-R18-CT	"Give us more time to meet and plan together"	Need for collaboration structures	Collaboration	Classroom Teacher

Table 1
Staff Feedback Coding Across Data Sources (Continued)

Code	Quote	Theme	Research Construct	Role
SF-P1-R21-CT	"Clear expectations would be helpful… having time before change would be helpful"	Lack of clarity	Trust / Capacity	Classroom Teacher
SF-P1-R25-SP	"Communication is always key… different emails get confusing"	Communication overload	Trust	Specialist
SF-P1-R30-CT	"Seesaw is a lot of work… I am on the computer 12+ hours a day"	Burnout / workload	Capacity	Classroom Teacher
TV-P1-R3-CT	"Emails as they happen"	Preference for timely communication	Communication	Classroom Teacher
TV-P1-R8-CT	"Could there be a place… to submit questions and have them answered?"	Desire for structured communication	Influence / Communication	Classroom Teacher
TV-P1-R15-CT	"Important upcoming dates… and celebrations of what went well"	Need for clarity and recognition	Trust / Communication	Classroom Teacher
TV-P1-R22-CT	"Communication this year has been a challenge… overloaded by emails"	Communication overload	Trust	Classroom Teacher
TV-P1-R24-CT	"We don't know where to go for information… we have lost connections"	Loss of organizational clarity	Trust / Collaboration	Classroom Teacher

Summary of Findings

The analysis of quantitative and qualitative data across the study period reveals a clear and consistent narrative regarding the impact of the merger on Forest Elementary. When examined holistically, the data illustrate a shift from a stable, moderately functioning organization to one experiencing significant degradation in teacher perceptions across multiple domains. This section synthesizes the findings to present the overarching story conveyed by the data.

Pre-Merger Organizational Stability

Prior to the merger, Forest Elementary was functioning at a *moderate but stable* level across key organizational conditions. Although the school was not classified as highly organized, it demonstrated consistent performance across multiple 5Essentials measures. Teacher collaboration was rated at 34, indicating a *weak* but stable level of collaborative practice. Teacher influence was measured at 39, suggesting *moderate* levels of participation in decision-making. Teacher–principal trust was *relatively strong* at 51, while teacher–teacher trust was measured at a *moderate* 43. Instructional leadership was rated at 44, indicating the presence of leadership structures to support teaching and learning.

Collectively, these indicators contributed to the school's classification as "*partially organized for improvement*." This designation suggests that while the school had not yet achieved high levels of organizational effectiveness, key systems were in place, relationships were intact, and the capacity for improvement existed. In other words, Forest Elementary entered the merger with a functional and workable foundation rather than in a state of organizational failure.

Introduction of Significant Structural Change

The merger introduced substantial structural changes that required teachers to adapt rapidly to new organizational conditions. These changes included the formation of new teams, the reorganization of grade-level structures, the alignment of curriculum, and the implementation of shared professional learning community (PLC) systems. Teachers were also required to collaborate with new colleagues, adjust to new expectations, and participate in revised decision-making processes. Importantly, these changes occurred simultaneously rather than incrementally. The convergence of multiple structural shifts created what can be described as

organizational shock, as teachers were required to navigate significant changes to both their professional roles and relational networks within a compressed timeframe.

One of the key mechanisms school administrators used to try to ease the transition was a weekly newsletter, distributed via email to all staff. Table 6 provides an overview of key quotations from this newsletter, aligned to the study's research questions and overall findings.

Table 6

Administrator Newsletter Quotes Aligned to Research Questions, Findings, and Chapter 4 Analysis

Date	Research Construct	Quote	Linked Finding	Chapter Reference	Source
12/4/2020	Collaboration	"The teachers make the school; the school does not make the teachers… Forest Elementary is its teachers."	Emphasis on teacher centrality contrasts with later declines in collaboration scores	Chapter 4 – Teacher Collaboration (Baseline Context)	Associate Principal Newsletter
12/11/2020	Trust / Communication	"Uncertainty is scary. Uncertainty in a pandemic can be terrifying."	Pandemic-related uncertainty contributed to declining teacher trust despite leadership communication	Chapter 4 – Teacher Trust (Staff Context)	Associate Principal Newsletter
12/11/2020	Communication	"We will share out any updates we have as soon as possible."	Increased communication efforts did not translate into improved teacher perception of trust or clarity	Chapter 4 – Teacher Trust (Administrator Actions)	Associate Principal Newsletter
2/19/2021	Communication	"We are setting aside time… to go over segments one day at a time… we will ease into the first few weeks…"	Structured communication systems implemented, yet perceptions of organizational clarity declined	Chapter 4 – Teacher Trust (Administrator Actions)	Associate Principal Newsletter

Table 6

Administrator Newsletter Quotes Aligned to Research Questions, Findings, and Chapter 4 Analysis (Continued)

Date	Research Construct	Quote	Linked Finding	Chapter Reference	Source
2/26/2021	Trust	"We know there will be mistakes, changes, and questions. That's okay."	Leadership transparency present, but insufficient to prevent decline in trust measures	Chapter 4 – Teacher Trust (Administrator Actions)	Associate Principal Newsletter
3/5/2021	Trust	"Please know that we trust you and your professional judgment."	Explicit expressions of trust contrast with declining teacher–principal trust scores	Chapter 4 – Teacher Trust (Administrator Actions)	Associate Principal Newsletter
5/11/2021	Influence	"What are some important day-to-day actions… we could take… to better utilize our staff's expertise…"	Opportunities for input existed, but teacher influence scores declined over time	Chapter 4 – Teacher Influence (Administrator Actions)	Associate Principal Newsletter / Feedback Prompt
8/2/2021	Influence	"What are your thoughts/feelings/perspectives on this change?"	Solicitation of feedback did not result in increased perceived teacher voice	Chapter 4 – Teacher Influence (Administrator Actions)	Associate Principal Newsletter / Feedback Prompt
Fall 2021 (Institute Day)	Capacity	"The only way we can meet all these varied needs is at the tier 1 level… Differentiation…"	Strong instructional focus may have contributed to student gains despite declining teacher perceptions	Chapter 4 – Building Teacher Capacity (Administrator Actions)	Associate Principal Newsletter
Fall 2021 (Institute Day)	Capacity	"Utilizing common assessments… is a data-backed way of succeeding school-wide."	Implementation of aligned instructional systems likely supported improved student outcomes	Chapter 4 – Building Teacher Capacity (Administrator Actions)	Associate Principal Newsletter

Table 6

Administrator Newsletter Quotes Aligned to Research Questions, Findings, and Chapter 4 Analysis (Continued)

Date	Research Construct	Quote	Linked Finding	Chapter Reference	Source
2/25/2022	Influence	"We have started sending out invites… to gather feedback about next year."	Formal feedback structures increased, but did not significantly improve teacher influence perceptions	Chapter 4 – Teacher Influence (Administrator Actions)	Associate Principal Newsletter
3/6/2022	Capacity	"Our SMART goals will allow us to see if we've been successful…"	Increased focus on measurable outcomes aligned with improved school performance data	Chapter 4 – Building Teacher Capacity (Administrator Actions)	Associate Principal Newsletter
3/6/2022	Collaboration	"Defining and sharing our values as a group is essential…"	Efforts to build shared norms occurred, yet collaboration scores declined	Chapter 4 – Teacher Collaboration (Administrator Actions)	Associate Principal Newsletter
4/30/2023	Collaboration	"Being back in the classroom… highlighted trust and collaboration's importance…"	Recognition of collaboration importance emerged after measurable decline in collaboration data	Chapter 4 – Teacher Collaboration (Post-Merger Reflection)	Associate Principal Newsletter
4/30/2023	Trust	"Placing your trust in others is hard… but it allows us to feel less pressure…"	Continued emphasis on trust-building suggests ongoing need following decline in trust measures	Chapter 4 – Teacher Trust (Post-Merger Reflection)	Associate Principal Newsletter

Organizational Disruption as a Central Theme

When examined collectively, the data reveal a clear pattern of organizational disruption following the merger. Teacher *collaboration* experienced a major breakdown, *capacity* showed a significant decline, *influence* decreased modestly, and *trust* experienced a severe decline. This pattern indicates that the merger disrupted several foundational elements of school improvement. Specifically, the findings suggest that three core pillars: *relational trust*, *professional collaboration*, and *instructional coherence* were destabilized during the transition. As these

elements weakened, *teacher capacity* also declined, reflecting the interconnected nature of organizational conditions within schools.

Organizational Strain Following the Merger

Overall, the data suggest that the merger resulted in short-term organizational strain as experienced by teachers. This strain was characterized by increased uncertainty, disruption of professional relationships, the introduction of multiple simultaneous initiatives, competing expectations, and a lack of clearly established shared norms.

Such conditions are likely to reduce organizational functioning in the short term, even when changes are intended to improve the system. The findings of this study indicate that while the merger introduced structures designed to support long-term improvement, the immediate effect was a decline in teacher perceptions across key organizational domains.

Conclusion

Overall, the analysis of 5Essentials data from 2019 to 2023 indicates a decline across multiple organizational domains following the merger. The most pronounced decreases were observed in *teacher collaboration* and *teacher trust*, while *teacher capacity* also declined substantially. *Teacher influence* showed a more modest decline. These results provide the foundation for the discussion presented in Chapter 5, where the implications of these findings are examined in relation to existing literature, leadership practice, and the broader context of school mergers.

CHAPTER V

DISCUSSION

The purpose of this study was to examine the impact of a school merger on organizational conditions at Forest Elementary, with a particular focus on teacher collaboration, teacher capacity, teacher influence, and teacher trust. Using a mixed-methods case study design, this research integrated Illinois 5Essentials survey data with qualitative staff feedback and administrator communications to understand how structural and organizational changes influenced teacher perceptions and school outcomes. It is important to note that the merger took place during the COVID-19 lockdown. Illinois schools saw a roughly 3-point drop in the overall 5Essentials composite score after COVID, with larger declines in teacher collaboration and instructional ambition, which may have affected the 5Essentials results (Illinois State Board of Education, n.d.). While statewide trends indicate general declines in teacher perception, the magnitude and pattern of decline observed at Forest Elementary suggest additional organizational factors beyond pandemic-related effects.

The findings presented in Chapter 4 revealed a notable divergence: while student achievement and overall school performance, as it factors into a school's overall rating, improved following the merger, teacher perceptions across multiple organizational domains declined. This chapter interprets these findings in relation to the research questions and situates them within the broader literature on educational change, professional learning communities, and relational trust.

Teacher Collaboration (RQ1)

Findings indicated a significant decline in teacher collaboration following the merger, despite the implementation of structures designed to support collaborative practices, including

professional learning communities (PLCs) (Dufour, 2016) and shared planning time (DuFour,2016). Although leadership emphasized collaboration through structural systems, staff feedback suggested that these systems were not fully internalized or experienced as effective.

This finding aligns with the work of Richard DuFour et al. (2016), who argue that effective PLCs require more than structural implementation; they depend on shared norms, trust, and collective responsibility for student learning. In this study, although collaborative structures were established, the relational conditions necessary for meaningful collaboration were still developing. Additionally, this pattern reflects Michael Fullan's (2007) concept of change overload. It is quite possible that the introduction of multiple new systems during the merger overwhelmed teachers, limiting their ability to engage fully in collaborative practices. These findings suggest that collaboration is highly sensitive to both relational conditions and the pace of organizational change.

Teacher Capacity (RQ2)

Teacher capacity, as measured through instructional leadership, professional development, and program coherence, also declined following the merger. This occurred despite the implementation of instructional coaching cycles, increased access to professional learning, and alignment of instructional practices. From a theoretical perspective, this finding reflects Fullan's (2007) assertion that capacity-building initiatives introduced during periods of significant change may initially reduce teachers' sense of efficacy. Although instructional systems may improve in quality, teachers may experience increased demands, uncertainty, and workload, leading to decreased perceptions of capacity.

At the same time, the focus on data-driven instruction and PLC practices aligns with recommendations from DuFour et al. (2016), who emphasize the importance of collective

inquiry and evidence-based decision-making in improving student outcomes. The improvement in student achievement observed in this study suggests that these systems were effective at the instructional level, even as teachers perceived them as demanding or overwhelming.

Teacher Influence (RQ3)

Teachers' perception of having influence showed a modest decline, suggesting that efforts to increase teacher voice through surveys, feedback systems, and distributed leadership structures did not fully translate into perceived influence. This finding is consistent with distributed leadership theory (CITE), which suggests that influence is not determined solely by opportunities for input, but by the extent to which that input is perceived as shaping decisions. Although leadership created structures for teacher participation, staff feedback indicated a desire for greater transparency and clearer connections between input and outcomes.

Furthermore, as noted by Anthony Bryk and Barbara Schneider, trust plays a critical role in perceptions of influence (Bryk & Schneider, 2002). In environments where trust is limited, teachers may be less likely to perceive decision-making processes as inclusive or meaningful, even when opportunities for participation exist.

Teacher Trust (RQ4)

Teacher trust experienced one of the most significant declines following the merger, particularly in teacher–principal and teacher–teacher relationships. This occurred despite consistent administrator communication emphasizing transparency, support, and shared responsibility. This finding directly aligns with Bryk and Schneider's (2002) work on relational trust, which highlights the importance of stability, consistency, and mutual respect in building trust within schools. The merger disrupted existing relationships and introduced uncertainty, making it difficult to sustain trust during the transition period. Additionally, Fullan (2007)

emphasizes that periods of rapid change can create ambiguity and stress, which may further erode trust. In this study, it appears that even well-intentioned leadership actions were insufficient to counteract the effects of organizational disruption, as evidenced by declining trust perceptions.

System-Wide Decline in Teacher Perceptions

Following the merger, the data indicate a consistent decline across all major organizational constructs measured in the study. This decline was evident in *collaboration*, *capacity*, *influence*, and *trust*, although the magnitude of change varied across domains. *Teacher collaboration* experienced the most dramatic decrease, declining from a stable score of 34 between 2019 and 2021 to a score of 12 in 2023. This change represents a substantial breakdown in collaborative practice. Measures related to *teacher capacity* also declined substantially. *Instructional leadership* decreased from 44 to 13, *quality professional development* from 38 to 16, and *program coherence* from 44 to 17, indicating that teachers perceived reduced support and alignment in instructional systems.

Teacher influence showed a more modest decline, decreasing from 39 to 34. Although less pronounced than other domains, this downward trend suggests that efforts to increase teacher voice were not fully realized in practice. In contrast, *teacher trust* experienced a severe decline across all measured relationships. Teacher–principal trust decreased from 51 to 29, teacher–teacher trust from 43 to 26, and teacher–parent trust from 52 to 24. These findings indicate a substantial erosion of relational trust within the organization.

Loss of Relational Stability

A key mechanism underlying these changes appears to be the loss of relational stability. The merger required teachers to rebuild professional relationships, renegotiate collaborative

norms, adapt to new leadership expectations, and integrate differing professional cultures. However, trust and collaboration are inherently relational processes that develop over time through consistent interaction and shared experiences.

The disruption of these established networks created challenges for the implementation of collaborative and instructional systems. As relational stability decreased, collaboration structures struggled to function effectively; professional learning systems felt fragmented, and overall trust declined. These findings highlight the importance of relational continuity in sustaining organizational effectiveness during periods of change.

Leadership Actions and Teacher Experience

The data further reveal a critical distinction between leadership actions and teacher perceptions. Throughout the merger process, administrators implemented a range of initiatives designed to support organizational improvement, including the establishment of PLC structures, the introduction of instructional coaching cycles, the development of communication systems, the creation of feedback mechanisms, and the expansion of professional learning opportunities.

Despite these efforts, the teacher perception data do not reflect a corresponding improvement in organizational conditions. Instead, perceptions declined across all major domains. This disconnect suggests that leadership intentions were not fully experienced or internalized by teachers. The pace and scope of change may have resulted in systems being implemented more rapidly than relationships and professional norms could adapt.

Explaining the Divergence Between Student Achievement and Teacher Perceptions

A central finding of this study was the divergence between improving student outcomes and declining teacher perceptions following the merger. While 5Essentials data indicated decreases in *collaboration*, *capacity*, *influence*, and *trust*, school performance metrics improved

during the same period. This pattern can be understood through the lens of educational change theory, particularly the work of Michael Fullan, Richard DuFour, and Anthony Bryk and Barbara Schneider, which emphasizes the complex interplay between structural reform, professional practice, and relational conditions in schools. Following the merger, the consolidation of two buildings into one effectively doubled the number of teachers available at each grade level, allowing for more intentional student–teacher matching. It is possible that this structural advantage contributed to improved student outcomes by increasing the likelihood of alignment between student needs and teacher strengths.

From a theoretical perspective, this reflects what Michael Fullan describes as the implementation of structural reforms that can produce early gains in student outcomes, even before deeper cultural change occurs (Fullan, 2007). While the system-level improvement enhanced instructional placement, teachers simultaneously experienced increased complexity in scheduling and decision-making. This finding aligns with Fullan's concept of *change overload*, in which multiple new processes and expectations are introduced simultaneously, often associated with decreased staff morale and perceived capacity despite improvements in student learning outcomes (Fullan, 2007).

Improved Community Cohesion and Student Belonging

The merger eliminated the historical division between East and West schools, fostering a more unified community in which students attended school with neighborhood peers. This shift could have impacted students' sense of belonging, a factor consistently linked to academic engagement and success. However, while students benefited from increased cohesion, teachers experienced the disruption of established professional relationships and building identities. This dynamic aligns with the work of Anthony Bryk and Barbara Schneider, who emphasize that

relational trust is built over time through stable interactions (Bryk & Schneider, 2002). The merger disrupted these relationships, and although community cohesion improved for students, trust among staff required time to rebuild. This situation might explain why student outcomes improved while teacher perceptions of trust declined.

Integration of Monolingual and Dual Language Instruction

The integration of monolingual and dual-language teachers into shared PLCs created opportunities to exchange instructional strategies, particularly those effective for English learners. Because high-quality instruction for multilingual learners benefits all students, this integration likely contributed to improved instructional practices across classrooms. This shift is strongly aligned with the work of Richard DuFour, who argues that effective PLCs focus on collective inquiry and shared responsibility for student learning (DuFour et al., 2016). The merger created the structural conditions necessary for such collaboration. However, DuFour also emphasizes that PLC effectiveness depends on the development of shared norms and trust. In this case, although the structure for collaboration was established, the relational conditions necessary for effective collaboration were still developing, perhaps contributing to declines in teacher perceptions despite gains in instructional quality.

Refocused Professional Learning Communities (PLCs)

Post-merger PLCs were intentionally redesigned to focus on student learning through the four guiding questions of a PLC. This shift represents a move toward a more data-driven and outcome-oriented approach to collaboration. According to DuFour et al. (2016), this type of focus is essential for improving student achievement, as it centers teacher collaboration on evidence of learning rather than procedural tasks. The improvement in student outcomes observed in this study is consistent with this framework. However, the transition to this model

also required significant changes in teacher practice, which aligns with Michael Fullan's assertion that meaningful change is often accompanied by a temporary decline in confidence and perceived effectiveness (Fullan, 2007).

Implementation of Instructional Coaching Cycles

The introduction of instructional coaching cycles provided targeted, job-embedded professional development aimed at improving classroom practice. Such models are widely supported in the literature as effective means of enhancing instruction and student achievement. However, from Michael Fullan's perspective, adding coaching cycles during a period of significant organizational change may contribute to change overload (Fullan, 2007). Furthermore, as noted by Anthony Bryk and Barbara Schneider, trust plays a critical role in how such initiatives are perceived. In environments where trust is still developing, coaching may be interpreted as evaluative rather than supportive, contributing to declines in teacher trust even as instructional quality improves (Bryk & Schneider, 2002).

Improved Grouping of Students with Similar Needs

The merger allowed for more precise grouping of students based on academic and behavioral needs, enabling more targeted instruction and intervention. This structural change may well have contributed to improved student outcomes by allowing educators to better differentiate instruction. From a theoretical standpoint, this change reflects the type of system-level improvement that Michael Fullan identifies as necessary for scaling effective practices (Fullan, 2007). However, implementing such systems often increases complexity for teachers, particularly when combined with other initiatives, contributing to perceptions of reduced capacity.

Enhanced Classroom Composition and Student Placement

The increased flexibility in classroom composition allowed administrators to create more balanced and productive learning environments. By strategically grouping students, the school reduced behavioral disruptions and maximized instructional time. However, as emphasized by Anthony Bryk and Barbara Schneider, trust is influenced not only by outcomes but also by the processes through which decisions are made (Bryk & Schneider, 2002). When teachers are not fully involved in placement decisions, even effective outcomes may not translate into positive perceptions.

Increased Access to Resources

The consolidation of resources following the merger allowed for more efficient allocation of instructional supports, materials, and personnel, contributing to improved student outcomes. However, as Michael Fullan notes, the introduction of new resources and systems does not automatically result in improved perceptions. Without sufficient time for integration, teachers may experience these changes as overwhelming (Fullan, 2007). Additionally, inconsistencies during implementation may further impact relational trust (Bryk & Schneider, 2002).

Limitations

Several limitations should be considered when interpreting the findings of this study. First, the study was conducted during the COVID-19 pandemic, a period characterized by significant disruption to schooling. The pandemic likely influenced both teacher perceptions and organizational conditions, making it difficult to isolate the effects of the merger from broader contextual factors.

Statewide Illinois 5Essentials data indicate a general decline in teacher perceptions across schools during the COVID-19 and post-COVID periods, particularly in domains related to

collaboration and instructional conditions. These broader trends suggest that the decreases in teacher perception observed at Forest Elementary may not be solely attributable to the merger but may also reflect systemic shifts in school climate experienced statewide. Additionally, the timing of the most significant declines, occurring in 2022 and 2023 rather than immediately following school closures, suggests that the pandemic's effects were prolonged and evolved over time. As a result, it is difficult to fully disentangle the impact of the merger from concurrent pandemic-related influences, and findings should be interpreted with caution, recognizing that both local organizational change and broader external conditions likely contributed to the observed outcomes.

Second, this study represents a single-site case study of Forest Elementary. Although the findings provide valuable insights into the impact of school mergers, they may not be generalizable to other contexts with different demographics, leadership structures, or organizational conditions.

Third, the study relies heavily on self-reported perception-based data, particularly the Illinois 5Essentials survey and qualitative staff feedback. While these data provide important insights into teacher experiences, they may not fully capture the complexity of organizational change or the full range of factors influencing student outcomes.

Additional Factors Influencing Findings

In addition to the broader contextual limitations discussed previously, several site-specific factors may have influenced the results of this study, particularly in relation to teacher perception data collected through the Illinois 5Essentials survey and qualitative staff feedback. These factors include teacher turnover and leadership transitions that occurred during the study period.

Teacher Turnover

Teacher turnover represents an important consideration when interpreting longitudinal perception data. Over the course of the study, a portion of the teaching staff changed due to normal attrition, transfers, and new hires. As a result, the individuals contributing to survey responses and qualitative feedback were not identical across all four years of data collection. This variation introduces a potential limitation in the comparability of results over time, as shifts in perception scores may partially reflect changes in the composition of respondents rather than changes in organizational conditions alone.

This consideration is particularly relevant in self-reported perception-based measures such as the 5Essentials survey, where results are influenced by individual experiences, expectations, and prior professional contexts. New staff members entering the organization during or after the merger may not have experienced pre-merger conditions and therefore may interpret collaboration, leadership, and trust differently from veteran staff. Conversely, teachers who exited the organization may have held systematically different perceptions than those who remained. As noted in the study's methodological approach, feedback data were collected anonymously to encourage honest responses; however, this anonymity also prevents tracking changes in perception at the individual level over time.

Furthermore, teacher turnover may itself be both a cause and a consequence of organizational change. The merger, coupled with broader pandemic-related disruptions, may have contributed to increased stress or uncertainty, influencing decisions to remain in or leave the organization. In this way, turnover is not only a methodological limitation but also a meaningful contextual factor that may have shaped the overall pattern of declining teacher perceptions observed in the data.

Leadership Change

Leadership transitions during the study period also represent a significant factor that may have influenced teacher perceptions. During the 2023 school year, both the principal and associate principal communicated that they would be transitioning to roles in other school districts at the conclusion of the academic year. This announcement occurred during the same period in which post-merger perception data were collected, introducing a potential source of uncertainty within the organization.

Research on school leadership and organizational trust suggests that stability and consistency in leadership are critical components of positive school climate and teacher trust. Changes in leadership, particularly anticipated transitions, can influence teacher perceptions by introducing ambiguity regarding future direction, expectations, and support structures. In the context of this study, teachers were not only adjusting to the structural and relational changes associated with the merger but were also processing an impending leadership transition.

Qualitative data collected during the merger process illustrate the importance of leadership communication and presence in shaping teacher experience. For example, administrator newsletters frequently emphasized transparency, responsiveness to feedback, and efforts to support staff during periods of change. However, the anticipated departure of key leaders may have altered how these efforts were perceived, potentially contributing to declines in factors such as teacher–principal trust and instructional leadership.

Additionally, leadership transitions may have influenced teachers' perceptions of long-term organizational stability. Even when leadership changes are communicated clearly and professionally, they can raise questions about the continuity of initiatives, the sustainability of systems such as PLCs and instructional coaching, and the school's future direction. These factors

may have contributed to the divergence observed in this study, in which structural and instructional improvements were underway, yet teacher perceptions declined.

Implications for Leadership Practice

The findings of this study have important implications for educational leaders responsible for planning and implementing school mergers. First, the results suggest that communication surrounding organizational change must extend beyond logistical updates and include ongoing opportunities to reinforce the purpose and intended outcomes of the change. Staff feedback indicated that participants desired more frequent reminders regarding the rationale for the merger and a clearer understanding of how the transition would benefit students. These findings suggest that school leaders should consistently articulate the vision for change throughout the implementation process, ensuring that stakeholders understand not only what decisions are being made but also why those decisions are necessary. Sustained communication regarding the purpose of a merger may help reduce uncertainty, increase stakeholder buy-in, and foster greater trust in leadership.

A second implication concerns the importance of maintaining a student-centered focus during periods of organizational change. While much of the work associated with the merger involved aligning systems, structures, and adult practices, participant feedback suggested that discussions frequently emphasized operational concerns rather than the anticipated benefits for students. Educational leaders engaged in school consolidation efforts should intentionally frame decisions around their impact on student learning, student belonging, and overall student outcomes. By explicitly connecting organizational decisions to student needs, leaders may strengthen stakeholder commitment to the change process and ensure that educational priorities remain at the forefront of decision-making.

The findings also underscore the importance of distributed leadership during large-scale organizational transitions. Although teacher-leaders were involved in many aspects of the merger, participants reported that opportunities for meaningful leadership were sometimes constrained by the pace and scope of the change process. Future school mergers may benefit from structures that empower teacher-leaders to play a more active role in planning, implementation, and problem-solving. Providing teachers with authentic leadership responsibilities may enhance collective ownership of the merger, increase collaboration among staff members, and contribute to a more sustainable implementation process.

This study highlights the need for educational leaders to carefully manage the pace of organizational change. Participants reported that multiple changes occurred simultaneously, creating challenges associated with adaptation and implementation. These findings suggest that leaders should consider a phased approach to school mergers whenever possible, allowing stakeholders sufficient time to understand, implement, and refine new practices before additional initiatives are introduced. A more deliberate pacing of change may reduce implementation fatigue, improve staff well-being, and increase the likelihood of long-term success. Collectively, these implications suggest that effective school mergers require clear and consistent communication, a sustained focus on student outcomes, meaningful opportunities for teacher leadership, and a strategic approach to managing organizational change.

Finally, the findings suggest that future educational leaders should attend to unmeasured areas, including informal communication, teacher well-being, and the long-term development of relational trust. These factors may play a critical role in sustaining improvement over time.

Recommendations for Future Research

Future research should examine the long-term impact of school mergers on both teacher perceptions and student outcomes beyond the initial implementation period. While this study provides insight into the experiences of staff during and immediately following a school merger, organizational change often continues to influence school culture, collaboration, and instructional practices for several years. Longitudinal studies could provide a deeper understanding of how teacher perceptions of trust, collaboration, leadership, and well-being evolve over time and whether initial perceptions persist, improve, or diminish as the merged school develops a shared identity.

Additional research should compare teacher perceptions and student outcomes in merger and non-merger school settings. Such comparative studies would help determine whether changes observed in teacher perceptions and student achievement are unique to the merger process or reflective of broader educational trends. The inclusion of comparable non-merger schools would be particularly valuable given that much of the merger examined in this study occurred during the COVID-19 pandemic. Pandemic-related disruptions may have influenced both teacher perceptions and student learning outcomes independent of the merger itself. Future studies that incorporate comparison schools not experiencing organizational change would provide greater confidence in attributing observed outcomes to the merger rather than external contextual factors.

Further research is also needed to examine the relationship between teacher perceptions and student learning outcomes. Although this study collected both teacher and student data, the findings suggest that the relationship between these variables may be more complex than commonly assumed. Future studies should investigate the conditions under which teacher perceptions and student achievement align as well as circumstances in which they diverge.

Understanding whether improvements in teacher well-being, trust, collaboration, and leadership perceptions are associated with measurable gains in student learning would contribute significantly to both the research literature and leadership practice.

Future researchers may also benefit from collecting more targeted and specific forms of stakeholder feedback during organizational change initiatives. In this study, many feedback opportunities relied on broad, open-ended prompts that provided valuable insights but did not always generate information specific to particular aspects of the merger process. More focused questions related to communication, leadership, decision-making, trust, collaboration, and student impact may yield richer data and allow researchers to more clearly identify which elements of a merger most strongly influence teacher perceptions and organizational outcomes. Such research could help educational leaders design more effective feedback systems and improve future merger implementation efforts.

Conclusion

This study contributes to the understanding of how school mergers impact organizational conditions and student outcomes. Findings indicate that while structural and instructional changes may lead to improved student achievement, they can simultaneously disrupt relational conditions and negatively impact teacher perceptions. A critical lens through which to interpret the findings of this study is the concept of change overload, as articulated by Michael Fullan (2007). Change overload occurs when multiple initiatives, structural shifts, and new expectations are introduced simultaneously, exceeding the capacity of individuals within an organization to effectively process and implement them. The findings of this study strongly align with this framework. During the merger process at Forest Elementary, teachers were required to simultaneously adapt to new team structures, revised curriculum alignment, newly implemented

PLC systems, expanded instructional expectations, and shifting organizational norms. These changes occurred within a compressed timeframe and were further compounded by the broader disruptions associated with the COVID-19 pandemic.

From a change overload perspective, the decline in teacher perceptions observed across *collaboration*, *capacity*, *influence*, and *trust* is not unexpected. Rather than reflecting failure of leadership or systems, these declines may represent a predictable response to the intensity and pace of organizational change. Fullan (2007) emphasizes that even well-designed reforms can produce negative short-term perceptions when the volume of change exceeds individuals' ability to adapt. This framework helps explain the central paradox identified in this study: While teacher perceptions declined, student achievement and overall school performance improved. Structural and instructional improvements such as enhanced PLC implementation, increased access to instructional resources, and more strategic student placement, were successfully enacted, but the human experience of navigating these changes lagged behind.

Additionally, Fullan's theory highlights the importance of sequencing and pacing in change initiatives. The findings suggest that Forest Elementary implemented multiple high-impact strategies simultaneously, including instructional coaching, data-driven PLCs, and increased teacher leadership opportunities. Although each of these initiatives is supported by research and likely contributed to improved student outcomes, their concurrent implementation may well have contributed to feelings of overwhelm among staff. This finding aligns with Fullan's assertion that when change is experienced as fragmented, rapid, or excessive, it can lead to reduced morale, diminished sense of efficacy, and weakened relational trust, all of which were reflected in the 5Essentials data.

Importantly, the alignment with change overload theory also provides a forward-looking interpretation of the findings. Fullan (2007) suggests that organizations experiencing change overload may show initial declines in perception before stabilizing and improving as systems become more embedded, and individuals regain a sense of efficacy and coherence. In this context, the declines observed in teacher perception at Forest Elementary may represent a transitional phase rather than a permanent condition. As collaborative structures, instructional systems, and relational networks continue to develop over time, it is reasonable to expect that teacher perceptions may improve and more closely align with the gains observed in student achievement.

Taken together, the findings of this study reinforce the importance of balancing the technical and human dimensions of change. Although the merger successfully advanced structural and instructional goals, the experience of change for teachers reflects the challenges described in Fullan's work. For practitioners, this finding underscores the need to carefully pace initiatives, prioritize relational trust, and provide sustained support during periods of significant organizational transformation.

The results underscore the complexity of educational change and the importance of attending to both technical and relational dimensions of school improvement. As schools continue to navigate organizational change, leaders must consider not only what changes are implemented but also how those changes are experienced by educators.

Ultimately, the change initiatives were implemented, with some success. As I reflected in one of my Leadership newsletters, "This is hard, but we have made it through remote and hybrid learning together, and that was really hard. I believe this, too, will be a success. In the immortal words of Nirvana, 'Come as you are.' Any way you feel about unifying the building is a valid

way to feel about it. Always feel free to reach out and share how you're feeling about the changes with us. We are here to help." (Associate Principal Newsletter, 1/14/22)

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APPENDIX A

Forest Elementary Unification Plan: Board Presentation Summary

This appendix summarizes key elements of the Forest Elementary East and West Unification Plan as presented to the Forest School Board on October 28, 2021. The presentation outlines the rationale, objectives, implementation strategies, and timeline for the merger of the two elementary schools into a single unified building.

Purpose of the Merger

The decision to unify Forest Elementary East and West was driven by both student-centered and organizational factors. As presented to the Board, the merger aimed to enhance student experiences by providing shared learning opportunities and increased access to grade-level peers while maintaining heterogeneous classroom groupings.

Additionally, declining enrollment across the district necessitated structural changes. Forest Elementary was identified as the final school in the district still operating under a dual-building model, making unification a logical step toward increased efficiency and coherence.

Objectives of the Unification Plan

The presentation identified several key objectives guiding the merger:

- Establish a unified school with a stronger sense of community
- Reflect on past practices while building a shared vision for the future
- Align instructional practices and initiatives across staff
- Increase flexibility to meet diverse student needs
- Include staff in the planning and decision-making process

- Explore opportunities to reintegrate third-grade dual language programming into the elementary setting

These objectives reflect a balance between structural alignment and stakeholder inclusion, emphasizing both organizational efficiency and collaborative engagement.

Implementation Strategies

To achieve these objectives, the unification plan outlined several strategies focused on collaboration, communication, and shared leadership:

- Development of teacher-led subcommittees to guide decision-making
- Emphasis on teacher voice throughout the planning process
- Alignment of practices across previously separate buildings
- Communication with families to clarify the implications of a unified elementary structure
- Integration of multiple existing systems into a single cohesive framework

These strategies demonstrate a clear intent to implement distributed leadership and inclusive planning processes.

Programmatic and Structural Considerations

The presentation highlighted specific programmatic decisions, including the reintegration of third-grade dual language students into the elementary school. This decision was made possible by declining enrollment, which created sufficient space within the building.

Additional district-level considerations included:

- Transportation logistics
- Facilities and operations adjustments
- Coordination with teaching and learning departments

These factors illustrate the complexity of the merger and the need for cross-departmental alignment.

Timeline of Implementation

The unification process occurred over multiple years:

- **FY21:** Initial planning and collaboration; schools remained operationally separate
- **FY22:** Continued planning; unification design developed
- **FY23:** Full implementation; students placed as one unified school in heterogeneous classrooms

This phased approach reflects a gradual transition intended to support both staff and students through the change process.